



Interactive Brokers

The Professional's Gateway to the World's Markets

Authorization to Designate a New Financial Advisor

Instructions for submitting your request:

1. All requests must include a Government-issued identification document (e.g., passport, Driver's License, etc.)
2. All fields must be completed in order for IB to process your request.
3. Return to IB either via Fax e-mail as scanned document to
IB LLC Customers +1-312-984-1017 Email: newaccounts@interactivebrokers.com
IB UK Customers +41 41 726 95 99 Email: newaccounts.uk@interactivebrokers.co.uk
IB Canada Customers +1-514-847-3490 Email: newaccounts.ca@interactivebrokers.com

Important Note: Submissions with incomplete forms or missing documentation may result in the delay or rejection of your request.

Please accept this letter of authorization to effectively change the management of the below said subaccount according to the following instructions, terms and conditions.

IB Account Number

IB Account Title

IB Account Number of New
Financial Advisor

Name of New Financial Advisor or Advisory
Firm

Provide the Reason for this request: _____

1. The undersigned hereby agrees that IB's books and records will be updated to reflect the designation of the new self-selected financial advisor. The undersigned will continue to observe, perform, and be bound by the terms and conditions and covenants of all documents, disclosures and agreements that currently exist between the undersigned and IB (including, but not limited to, the Customer Agreement and the Discretionary Trading Authorization/Power Of Attorney For Financial Advisor Request To Send Trade Confirmations And Account Statement To Advisor).
2. The undersigned hereby represent, warrant and certify that the transfer(s) to be effected pursuant to the above Transfer Instructions will be in full compliance with any applicable documents (e.g., Trust document, organizational documents, Financial Advisory Agreements, etc.) and applicable law.
3. The undersigned agree to indemnify and hold Interactive Brokers LLC and its affiliates, and their respective directors, officers, and employees (individually and collectively, an "Indemnified Party") harmless from and against any claim, loss, liability, cost and expense incurred, (including but not limited to attorney fees, tax implications, liquidations, etc.) by such IB Indemnified Party as a result of or arising from (i) IB effecting the transfer; or (ii) IB's reliance on these written instructions, including any representations made herein.

Signature of Primary Acct Holder / Trustee	Print Name	Date
Signature of Secondary Acct Holder / Beneficiary	Print Name	Date

Please allow 7-10 business days for the manual processing of requests submitted via this form to be completed.