



820 Jorie Blvd. Suite 420  
Oak Brook, IL 60523  
800.560.1288 Telephone  
630.368.5694 Fax

www.mtrustcompany.com

# THIRD PARTY AUTHORIZATION

(for Advisor Services Clients Only)

## A THIRD PARTY DESIGNATION

I, the undersigned Account Owner, hereby give the individual designated herein third party the authorization(s) checked below: (To give more than one person authorization to your account, including individuals at one firm, you must complete one form per individual.)

- Receive Duplicate Statements
- View my account online/receive online statements (*Designated Third Party e-mail address required in Section B.*)
- Discuss my account with Millennium Trust Company, LLC

## B DESIGNATED THIRD PARTY INFORMATION

Name:

Firm Name (if applicable):

Address:

City:

State:

Zip:

Phone No.:

E-mail Address:

## C ACCOUNT OWNER'S ACKNOWLEDGEMENT AND SIGNATURE

I understand that it is my sole responsibility to direct my designated third party. Millennium shall honor the authorization(s) given to the designated third party until such time as Millennium receives written notice from me that such authorization(s) have been revoked. I, and not Millennium, shall be liable for the acts and omissions of my designated third party. I agree to be bound by the actions of my designated third party.

If I have authorized my designated third party to direct or execute transactions above, Millennium shall execute investment directions received from my designated third party and shall not have any responsibility nor any liability for any loss of income or capital, nor for any unusual expense which Millennium may incur relating to any investment or the sale or exchange of any asset which my designated third party directs. Millennium will not act as an investment advisor and has no duty to question any such investment direction. Millennium is not responsible for the advisability, appropriateness or compliance of any such direction with the Employee Retirement Income Security Act of 1974 ("ERISA") or any applicable law or regulation.

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Account Owner's Name

\_\_\_\_\_

Account Owner's Signature

Millennium Account No.

## D DESIGNATED THIRD PARTY'S SIGNATURE

I, the undersigned, hereby accept my appointment as a designated third party by the above Account Owner, and in that capacity I agree to be bound by all the terms and conditions that govern the Account Owner's account at Millennium.

Third Party Signature: \_\_\_\_\_ Date: \_\_\_\_\_

For Millennium Trust Company, LLC Use Only:

