



Using **DocuSign** is the fastest way to complete your request.

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Or email this form to service@geowealth.com

1. Account Information

Account Holder/Trustee/Custodian/Executor

Co-Account Holder/Co-Trustee/Co-Custodian/Co-Executor

Account #(s)

2. I consent to paperless electronic delivery to this email address:

By signing above, I/we hereby authorize and consent to receive electronic delivery of all communications, statements, reports, confirmations, notices or other documents (collectively "Documents") pertaining to my/our account(s) managed by GeoWealth. Client may revoke this consent at any time by providing GeoWealth with written notice to withdrawing this consent.

Effective Delivery: Electronic Delivery will be effective regardless of whether client actually accesses, reviews or retrieves the Documents. GeoWealth is not responsible for any computer viruses, problems or malfunctions associated with electronic delivery or resulting from client's misuse of any passwords, computer or other device.

3. I would like to update the delivery method to mail (paper) for:

This includes, but is not limited to, monthly statements and tax reports.

GeoWealth Performance & Billing Reports: By checking this box and signing below, I acknowledge that I will be charged \$3 per month for the first account and \$1 per month for each additional account.

Custodial Statements and Tax Documents: By checking this box and signing below, I acknowledge that I am responsible for any custodial fees resulting from this request.

4. Owner(s) Signature

The undersigned client(s) hereby direct GeoWealth Management LLC to effect the instructions and/or changes as directed by this LOI.

Account Holder/Trustee/Custodian/Executor

Date (MM/DD/YYYY)

Additional Account Holder/Co-Trustee/Co-Custodian/Co-Executor

Date (MM/DD/YYYY)