



Please [complete this form via DocuSign](#) or email it to [service@geowealth.com](mailto:service@geowealth.com).

Use this form to group your accounts for GeoWealth reports and portal access.

## 1. Account Owner Name

Account Owner/Trustee/Custodian/Executor

Co-Account Owner/Co-Trustee/Co-Custodian/Co-Executor

## 2. Account Numbers to be Household

\*Account owners are able to access all information for every account grouped in a Household.

## 3. Owner Signature(s)

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

Account Owner/Trustee/Custodian/Executor				/	/
	Date	MM	DD	YYYY	
Account Owner/Co-Trustee/Co-Custodian/Co-Executor				/	/
	Date	MM	DD	YYYY	
Account Owner/Co-Trustee/Co-Custodian/Co-Executor				/	/
	Date	MM	DD	YYYY	
Account Owner/Co-Trustee/Co-Custodian/Co-Executor				/	/
	Date	MM	DD	YYYY	

\*All account owners to be included in the household must sign this form.