



## THIRD PARTY ACCESS AGREEMENT

**PLEASE NOTE:** Third party access to your account can be revised at any time. The designated party will have limited access to your IRA Club account but does not have authorization to transfer funds or make investments on your behalf.

### 1. ACCOUNT OWNER INFORMATION

NEW ACCOUNT

REVISION

REMOVAL

FULL NAME	IRA CLUB ACCOUNT NUMBER(S)
LAST 4 OF SSN	PHONE NUMBER

### 2. THIRD PARTY ELECTION

NAME OF DESIGNATED PARTY	FIRM NAME (IF APPLICABLE)
EMAIL	PHONE NUMBER

### 3. ACKNOWLEDGEMENT AND SIGNATURE

- A. I currently hold (or am now in the process of opening) an account with IRA Club.
- B. The designated third party on this form may seek information regarding the above-captioned account.
- C. The designated third party may not transfer funds, transfer assets, or authorize investment transactions on behalf of the account owner.
- D. As the account owner, I grant items B and C to the above named third party.

INDEFINITELY

UNTIL THIS DATE: \_\_\_\_\_

- E. I now and forever hold harmless and release IRA Club and its employees for any and all errors in the execution of this agreement. I further understand and agree that IRA Club and its employees cannot be responsible for all actions that a third party may take.
- F. I understand disputes may arise from this agreement. IRA Club will settle disputes in Cook County, Illinois, and that the laws and regulations of Cook County, Illinois shall apply.
- G. Separation: I understand the IRA Club is an independent company and is not related to the third party.

SIGNATURE	DATE SIGNED
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**QUESTIONS?** We are available via phone Monday-Friday between 9:00 AM - 5:00 PM CT - Call 312-795-0988

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**FAX TO** 312-283-2615

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