



Account # _____ Branch # _____ IC# _____

LETTER OF AUTHORIZATION TO TRANSFER
FUNDS OR SECURITIES BETWEEN ACCOUNTS

Date: _____

I. I hereby authorize the transfer of funds and/or securities

From Account number: _____

Account name: _____

To Account number: _____

Account name: _____

Bank Routing information, if applicable

Bank name: _____

Bank address: _____

Routing number: _____

II. Amount of funds to be transferred: _____

OR

Quantity and Description of Securities to be Transferred:

III. Reason for the above Transfer / Special Instructions:

All account holders and recipients must sign the Letter of Authorization. If more than two signatures are required, please complete additional forms as necessary.

Signed: _____

Signed: _____

Print Name: _____

Print Name: _____

Title: _____

Title: _____

(Notary/Medallion guarantee required per signature)

(Notary/Medallion guarantee required per signature)

Date Requested: _____ Rep #: _____ Branch #: _____

Approved By: _____, Principal of the firm