

**Instructions**

- Complete both sides of this application.
- Remember to sign your completed application on the back page.
- Return the application to your investment professional or financial organization.

**Account Number(s)**

List all account numbers with an optional description of the account type to help you differentiate multiple accounts once you are logged into NetExchange Client<sup>®</sup> (for example, retail account or retirement account).

ACCOUNT NUMBER

DESCRIPTION (OPTIONAL)

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**User Identification (ID)**

Your user ID will be assigned to you. You will be sent an e-mail regarding account access.

**Account Information**

DATE OF BIRTH

MOTHER'S MAIDEN NAME (FOR PASSWORD)

E-MAIL ADDRESS

**Signature**

All account owners must sign below.

\_\_\_\_\_  
NAME

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
NAME

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
NAME

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
NAME

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
NAME

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
NAME

\_\_\_\_\_  
SIGNATURE

NetExchange Client is provided to you by your financial organization, clearing through Pershing LLC.

**FOR OFFICE USE ONLY**

\_\_\_\_\_  
DATE

\_\_\_\_\_  
ACE ENTITLEMENT COMPLETED BY

\_\_\_\_\_  
INVESTMENT PROFESSIONAL'S NAME

\_\_\_\_\_  
INVESTMENT PROFESSIONAL'S NUMBER