

# STATEMENT FAMILY REQUEST

## Institutional Advisor Services



### SECTION 1: General Instructions

Use these instructions to complete the Statement Family Request form.

**Purpose of form:** Use this form to create a Statement Family or to add accounts to or remove accounts from a Statement Family.

**Print or type all entries.** Print clearly in all CAPITAL LETTERS to complete this application. To type entries, a fillable PDF of this form can be found online at [www.trustamerica.com/advisor-forms](http://www.trustamerica.com/advisor-forms).

**IMPORTANT:** You must **complete all required fields and provide all required signatures** to expedite processing and to avoid requests for additional information.

### SECTION 2: Request Type

Select one:

- Create a new Statement Family
- Delete an existing Statement Family
- Modify an existing Statement Family, select at least one below:
  - Add account(s) to an existing Statement Family
  - Remove account(s) from an existing Statement Family

### SECTION 3: Primary Account Holder Information

**IMPORTANT:** If you have accounts with multiple advisors at Trust Company of America (TCA), only the accounts managed by a single investment advisor may be placed in a Statement Family.

Primary Account Number
Account Registration
Account Registration (continued)
Last 4 digits of Social Security or Tax Identification Number
Investment Advisor

### SECTION 4: Additional Statement Family Accounts

1. Select one:  Add  Remove

<b>TCA Account Number</b>
Account Registration

2. Select one:  Add  Remove

<b>TCA Account Number</b>
Account Registration

3. Select one:  Add  Remove

<b>TCA Account Number</b>
Account Registration

4. Select one:  Add  Remove

<b>TCA Account Number</b>
Account Registration

Additional page attached

TCA Account Number
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### SECTION 5: Account Holder Authorizations and Signatures

#### Primary Account Owner Authorization

As account owner, I/we hereby designate the account named in Section 3 as the Primary Account for the Statement Family. I/We request TCA to modify the Statement Family as indicated in Section 4. I/We attest that I/we will hold TCA harmless from any loss, claim, expense, or other liability for this action.

#### Added Account Owner Authorization

I hereby certify that the account(s) referenced in Section 4 is(are) managed by the Investment Advisor named in Section 3, and I authorize TCA to modify the Statement Family for the Primary Account designated in Section 3. I understand that I will no longer receive account statements as a result of this action. I further understand that the account owner of the Primary Account for the Statement Family will elect the method of statement delivery and can designate a new Primary Account without further authorization from the other members of the Statement Family.

I further attest I will hold TCA harmless from any loss, claim, expense or other liability for this action. If at some later time I wish to discontinue having my statement sent to the Primary Account, I must send new written instructions to TCA to make this change.

Primary Account Owner's Signature	Date
Print Name	

Joint Account Owner's Signature (if applicable)	Date
Print Name	

#### All Other Account Owners Included in Primary Account Owner's Statement Family, Sign Below

Account Owner's Signature	Date
Print Name	

Account Owner's Signature	Date
Print Name	

Account Owner's Signature	Date
Print Name	

Account Owner's Signature	Date
Print Name	

Additional page attached



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