



Advisory Account  
Change Authorization

280 S. Mangum Street • 550 Diamond View II • Durham • North Carolina • 27701 • Phone : (919) 490-6717

**ACCOUNT REGISTRATION**

Owner / Custodian: \_\_\_\_\_ SSN: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Joint Owner/Minor: \_\_\_\_\_ SSN: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Advisor: \_\_\_\_\_ Code #: \_\_\_\_\_ Phone: \_\_\_\_\_

**[ ] TRANSACTIONAL REQUESTS WITH-IN ACCOUNT #: \_\_\_\_\_**

	Aggressive	Growth	Growth & Income	Income	Preserve Capital
\$ _____ or _____ % From Model/Holding: _____	( )	( )	( )	( )	( )
To Model: _____	( )	( )	( )	( )	( )
\$ _____ or _____ % From Model/Holding: _____	( )	( )	( )	( )	( )
To Model: _____	( )	( )	( )	( )	( )

**[ ] REALLOCATION OF ACCOUNT #: \_\_\_\_\_**

_____ %	Model: _____	( )	( )	( )	( )	( )
_____ %	Model: _____	( )	( )	( )	( )	( )
_____ %	Model: _____	( )	( )	( )	( )	( )
_____ %	Model: _____	( )	( )	( )	( )	( )

**[ ] CONTRIBUTION AND/OR DISTRIBUTION ELECTIONS FOR ACCOUNT #: \_\_\_\_\_**

[ ] Allocate Contributions To: \_\_\_\_\_ ( ) ( ) ( ) ( ) ( )

[ ] Process Distributions From: \_\_\_\_\_ ( ) ( ) ( ) ( ) ( )

\_\_\_\_\_  
Owner's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Joint Owner's Signature

\_\_\_\_\_  
Date