



Retirement Account Solutions
Program Registration / Change Form

280 S. Mangum Street | 550 Diamond View II | Durham, NC 27701 | www.verityinvest.com | Phone: (800) 247-6717

Check One: [] Initial Registration [] Change Only

Date Completed: _____

Advisor Name: _____ Daytime Phone: _____

Client Name: _____ DOB: _____ SSN: _____

Mailing Address: _____

Email Address: _____ Daytime Phone: _____

Household Links: _____

Registration #1

Employer: _____ Plan Name: _____

Custodian: _____ Account Number: _____

Account Registration: [] 403(b) [] 401(a) [] 401(k) [] Individual Retirement Account [] Other: _____

Estimated Account Balance: \$ _____

Investment Strategy: [] Conservative [] Balanced [] Dynamic Growth [] Focused Growth [] Advisor Directed (Attach Instructions)

Advisor Fee Schedule: _____ bps (5 - 150 bps, annually, in 5 bp increments)

Payment Method: [] Direct Account Debit [] ACH [] Alternate Account: _____

Registration #2

Employer: _____ Plan Name: _____

Custodian: _____ Account Number: _____

Account Registration: [] 403(b) [] 401(a) [] 401(k) [] Individual Retirement Account [] Other: _____

Estimated Account Balance: \$ _____

Investment Strategy: [] Conservative [] Balanced [] Dynamic Growth [] Focused Growth [] Advisor Directed (Attach Instructions)

Advisor Fee Schedule: _____ bps (5 - 150 bps, annually, in 5 bp increments)

Payment Method: [] Direct Account Debit [] ACH [] Alternate Account: _____

Advisor Signature _____

Date _____

Print Name _____

RIA Firm Name _____

Phone Number _____