**PAPERWORK INSTRUCTIONS**

*Please follow the instructions below for completing the enclosed paperwork*

All forms are marked with stickers for each client signature and/or initials. Please be sure to double check each marked space before returning this packet.

1. **Client New Account Forms**
   * 2 Places to Initial & 1 Place to Sign and Date (per client)
   * One form for each client account – Joint accounts require initials and signatures from both parties
2. **Account Transfer Forms**
   * 1 Place to Sign and Date (per client)
   * One form for each client account – Joint accounts require initials and signatures from both parties
3. **ACH Form** *(Only applicable to clients with linked bank accounts or internal transfer setups)*
   * 1 Place to Sign and Date (per client)
   * One form for each client account with instructions – Joint accounts require signatures from both parties
4. **Investment Advisory Agreement**
   * 3 Places to Initial & 1 Place to Sign and Date (per client)
   * One form per relationship – All clients initial and sign on the same form
5. **Client Letter to [Prior Firm]**
   * 1 Place to Sign (per client)
   * One letter for each relationship – All clients sign on same letter
6. **Firm Brochure – Form ADV Part 2A, ADV Part 2B, & Privacy Policy Statement**
   * Keep for your records – No signatures required

**Return all signed paperwork to [Advisor] in the return envelope provided. Thank you!**