Account Update
Change Advisor - Advisory

ATCA

Accepting Rep ID: TL5P

Instructions: This form is to be used to change the investment advisor representative ("IAR") for SAM/SAM II, MWP, OMP-Advisory, PWP, Manager Select, and GWP accounts. If this form is used for an MWP account, and a Dimensional Model is chosen, the new IAR must be approved by DFA in order for the account to be transitioned.

*****Please note: Account updates related to advisory accounts moving from an Independent Advisor (IAS) to an Institution Services Advisor (IS) will require a new account application and the assets need to be journaled between accounts. Please contact IS Business Consulting regarding questions related to this process.*****

Please note: If the IAR(s) currently listed on the account has been terminated with LPL, we must receive this form within 45 days from the date of IAR(s) termination. If not received within 45 days of IAR(s) termination, a new account will have to be established and new account paperwork will be required.

Please note: For GWP accounts, this form cannot be used after advisor termination. A new account will have to be established and new account paperwork will be required.

Please email the completed form to Rep Maintenance at repimaging.email@lpl.com or fax to (858) 202-8350.

Section I: Account Information

A. Current Investment Advisor Representative(s):

Investment Advisor Representative Name(s): JACOB GIROUARD

Current IAR ID or Joint IAR ID: JV3C

B. New Investment Advisor Representative(s):

Investment Advisor Representative Name(s): NATHAN MELCHI

New IAR ID or Joint IAR ID: TL5P

Section II: Change Advisor on Specific Accounts

List all account numbers to be assigned to the new advisor. All accounts must belong to the same account owner(s).
PLEASE NOTE: If this is a Manager Select account, notice of the change of IAR will be provided to the portfolio manager.

Client Name(s)

Account Number	Account Number	Account Number	Account Number
Account Number	Account Number	Account Number	Account Number

Section III: Performance and Cost Basis

The existing performance history and cost basis information will automatically be carried forward on this account. If new performance history and cost basis information for this account is required, the current account must be closed and a new account opened with a new account number.

Section IV: Account Holder Acknowledgment

I/We acknowledge that the information contained in this document represents an amendment to the Account Agreement for the LPL Financial LLC ("LPL") account(s) referenced in Section II above that was signed at the time I opened the account(s). Upon execution of the Account Agreement, I designated the IAR(s) identified in Section IA to provide certain services pursuant to the terms of the Agreement. This Amendment changes the IAR(s) designated in the original Account Agreement and designates the new IAR(s) identified above in Section IB. This Amendment is hereby incorporated by reference in the Investment Advisory Agreement as if fully set forth therein.

I/We acknowledge that I/we have read and understand this Amendment and by executing where indicated below, agree to these changes to my/our Account Agreement. I/we acknowledge receiving a copy of this Amendment and any required ADV Part 2B Brochure Supplement for the new IAR(s).

All forms received 30 days post client signature date will be rejected.

Account Holder Signature	Account Holder Name (print)	Date
Account Holder Signature	Account Holder Name (print)	Date
New Financial Advisor / Authorized Person Signature	New Financial Advisor / Authorized Person Name (print)	Date
New Financial Advisor / Authorized Person Signature	New Financial Advisor / Authorized Person Name (print)	Date
New Financial Advisor / Authorized Person Signature	New Financial Advisor / Authorized Person Name (print)	Date