

Advisor Firm Payment Instructions

STEP 1 FINANCIAL FIRM PAYMENT INFORMATION

Firm Name: _____ Firm CRD #: _____

Email Address for Confirmation Details: _____

Payment Instructions (select **ONE** option): New (include a signed W9) Update

Please select only **ONE** method of payment.

Receipt of Payment Method (select one):

Option 1: ACH

Bank Name _____

_____ Account Type: Checking Savings

Name(s) on Bank Account _____

Bank Address _____

City _____ State _____ Zip _____

Routing Number _____ Account Number _____

Option 2: Mail Check

Payee _____

Address _____ City _____ State _____ Zip _____

Special Check Instructions _____

STEP 2 ACKNOWLEDGEMENT AND AUTHORIZATION

Name _____

▶ _____

Signature

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Date (month | day | year)