

Rep Name: _____

☐ I do not have any outside accounts to report under FINRA Rule 3210. *(Please skip to signature section)*

The undersigned is a Registered Representative ("RR") and/or Investment Adviser Representative ("IAR") of Equity Services, Inc. ("ESI") or is the owner/co-owner of an account reportable by a RR or IAR of ESI under FINRA Rule 3210. Therefore, the undersigned authorizes the sharing of account information with ESI. This information should be sent to ESI's designated third-party service provider via electronic feed, which has been previously established between the executing firm (noted below) and Equity Services, Inc.

ESI maintains automated data feeds with the following firms:

Ameriprise	JP Morgan	Robinhood
Betterment Securities	Kestra Financial	Stifel Nicolaus
Charles Schwab	LPL Financial	T. Rowe Price
Chase Investment Services	Merrill Lynch	TD Ameritrade
Citi	MML Investors Services	UBS
Commonwealth	Morgan Stanley/Smith Barney	USAA
Davenport & Co	NFS	Vanguard
E*Trade	Options Express	Wealthfront
Edward Jones	Prudential	Wells Fargo
Fidelity	Raymond James	
Interactive Brokers	RBC Wealth Management	

Account information *(make additional copies of this form as needed)*:

Account Holder: _____

Last 4 of SSN: _____

Account No(s): _____

Account Open Date(s): _____

*****If this is an existing account, please include a copy of the most recent account statement with this form*****Registration Type: *(i.e. RIRA, Trad. IRA, JTWROS, IND, etc.)* _____

Brokerage Firm: _____

Brokerage Firm Contact Information *(email or fax preferred)*: _____

Registered Rep/Account Owner Signature: _____ Print Name: _____ Date: _____

Co-Owner/Joint Account Owner Signature *(if applicable)*: _____ Print Name: _____ Date: _____