



# Web Site and Statement Consolidation Householding

Through a process called householding, Legent Clearing can group your related accounts together for mailing and financial reporting and web site access. This offers you added convenience and will not change the frequency or timing of your statements. You will receive a consolidated cover sheet, which includes a combined portfolio value and combined income and distributions for all of your accounts. Attached to this cover sheet will be statements for each of your accounts.

**Please use this form to initiate or cancel householding.**

- Initiate Statement Householding Only \*τ**
- Initiate Web Site Householding Only \***
- Initiate Both Householding Options \*τ**
- Cancel Existing Statement Householding Only \*τλ**
- Cancel Existing Web Site Householding Only \*λ**
- Cancel All Existing Householding Options \*τλ**

- \* Please complete the information below for all accounts.
- \* All account owners must sign where indicated.
- τ All accounts must have the same mailing address. Please check "Change of address required" to authorize a change of address.
- λ Accounts not listed will continue to be householded.

**If additional space is required, please use additional forms. Statement Householding will begin 30 days after Legent Clearing receives your completed form. Web site householding will begin 5-7 days after Legent Clearing receives your completed form.**

## Primary Account Information

Account Number \_\_\_\_\_

Account Registration \_\_\_\_\_

Social Security/Tax I.D. \_\_\_\_\_

Owner Signature \_\_\_\_\_

Owner Signature \_\_\_\_\_

## Underlying Accounts:

Account Number \_\_\_\_\_

Account Registration \_\_\_\_\_

Social Security/Tax I.D. \_\_\_\_\_

Owner Signature \_\_\_\_\_

Owner Signature \_\_\_\_\_

Change of Address Required

Account Number \_\_\_\_\_

Account Registration \_\_\_\_\_

Social Security/Tax I.D. \_\_\_\_\_

Owner Signature \_\_\_\_\_

Owner Signature \_\_\_\_\_

Change of Address Required

Account Number \_\_\_\_\_

Account Registration \_\_\_\_\_

Social Security/Tax I.D. \_\_\_\_\_

Owner Signature \_\_\_\_\_

Owner Signature \_\_\_\_\_

Change of Address Required

Account Number \_\_\_\_\_

Account Registration \_\_\_\_\_

Social Security/Tax I.D. \_\_\_\_\_

Owner Signature \_\_\_\_\_

Owner Signature \_\_\_\_\_

Change of Address Required