



Account Access Authorization Form

This form should be used if you want your financial advisor, broker or other designated individual to have access to your IRA or Custody Account (“Account) as your “Designee”. The firm or organization with which your designee is affiliated will be referred to herein as the “Firm”.

This form authorizes TMI Trust Company (“TMI”), as custodian for your Account, to:

- Provide your Designee and the Firm with unlimited internet access to your Account information.
- Provide your Designee and the Firm with account statements and such other information as requested.

I understand that:

- My Designee and the Firm are both in no way agents or representatives of TMI.
- I may revoke/replace my Designee or Firm by providing written notice to TMI. This change will not cancel any instructions received by TMI prior to TMI receiving such notification.
- I agree to indemnify and hold TMI harmless for any loss or breach of any kind because TMI acted on instructions from me, my Designee or the Firm.
- If my Designee should leave the Firm, the Firm will continue to have access to my Account unless I change this designation by written notice to TMI, or unless the Firm instructs TMI in writing to remove their designation in which case the Designee will continue to have access to my Account information.

I represent that by signing below, I understand and agree to the terms of this Account Access Authorization Form, and that I designate the individual and the Firm listed below as the Designee for my account:

Account Name (Please Print): _____

Account Number or SSN: _____

Broker Dealer Firm: _____

Firm Number: _____ Phone Number: _____

Account Representative: _____

Representative Number: _____

Account Holder Signature

Date