



INTERESTED PARTIES FORM

Complete this form and fax or mail to Private Client Services.

Use this form to add an Interested Party to a Pershing Brokerage account. The client(s) can choose to add duplicate statements and/or confirms to be sent.

Fax: 502-473-1721

**Mail: Private Client Services
2225 Lexington Road
Louisville, KY 40206**

Primary Account Owner Name:				
Secondary Account Owner Name:				
This change request applies to the following accounts: (List account numbers)				
New Address:				
First Interested Party			Second Interested Party	
Select: <input type="checkbox"/> Statement <input type="checkbox"/> Confirmation			Select: <input type="checkbox"/> Statement <input type="checkbox"/> Confirmation	
Name: _____			Name: _____	
Address: _____			Address: _____	
City: _____ State: _____ Zip: _____			City: _____ State: _____ Zip: _____	
Telephone: _____			Telephone: _____	
Email: _____			Email: _____	

Electronic Confirmations Institution ID Confirm: _____

Primary Account Owner Signature:	Date:
Secondary Account Owner Signature:	Date:
Representative Signature:	Rep Code: