

Check the item(s) to update on your existing FTJFC non-qualified account(s) - ie. Taxable, IRA, etc.:

- Address Change: Sections 1 and 5
- Automatic Rebalance (for Self-Directed accounts ONLY): Sections 1, 3, 5 or 6
- Name Change: Sections 1 and 5
- Cost Basis: Sections 1, 4, and 5 or 6
- Statement/Confirm Delivery: Sections 1, 2, and 5

1. CLIENT INFORMATION (REQUIRED)

List All Account Numbers affected by the updates requested above:

Name(s) - Legal documentation (ie. marriage certificate, divorce decree, etc.) is required for name changes	Marital Status: <input type="checkbox"/> Single <input type="checkbox"/> Married
Legal/Physical Address (Cannot be a PO Box) City State Zip Code	
Mailing Address if different from above	
Home Phone Number	Work Phone Number E-Mail Address

2. STATEMENT AND CONFIRM DELIVERY

DOC TYPE	ELECTRONIC	PAPER
Statement**	<input type="checkbox"/>	<input type="checkbox"/>
Confirm	<input type="checkbox"/>	<input type="checkbox"/>

**By selecting "Electronic", I have entered an email address in Section 1 above and agree to receive electronic statements. I understand the FTJFC Annual Account Maintenance Fee is \$25.

**By selecting "Paper", I wish to receive paper statements. I understand the FTJFC Annual Account Maintenance Fee is \$50.

3. AUTOMATIC REBALANCE (For Self-Directed accounts ONLY – Not available for accounts allocated to a strategist model)

- Yes, rebalance my account(s) automatically. I understand my account(s) will be rebalanced at the beginning of each calendar Quarter on or about the 10th of the month, and my account(s) will be rebalanced according to the model allocation on record at that time.
- Please stop the Automatic Rebalance previously established on my account(s).

4. COST BASIS

Your choice will apply to the accounts listed in Section 1 and NOT to any future accounts. FTJ FundChoice will apply the **First In, First Out (FIFO)** method to your covered shares if no election is made. Consult a qualified tax professional to determine which cost basis method is appropriate for your tax situation.

First In, First Out (Default) Average Cost

*Note: Specific Lots may be specified prior to trade settlement. You should provide specific lot detail via email to your FTJ Service Team.

5. CLIENT SIGNATURE: (Required for Name Changes, Address and Email Changes, and Electronic Statement/Confirm Delivery)

 Primary Owner Signature (if name change, both old and new name must be signed) Joint Owner Signature Date

6. ADVISOR SIGNATURE: (Acceptable for updates to items 3 AND 4 above)

 Advisor Signature Date