



Additional information required to open a FOLIOfn account:

Client primary e-mail address: _____

(Note: Required to avoid Folio's \$150 annual fee for paper mailings.)

Are you a director, 10% shareholder, or executive who makes policy at a public company?

Company: _____

Are you *employed* by a stock market, the NASD, or a firm that is a member of either one? If you are only *associated* with one of these entities, please leave blank.

Company: _____

Retired

Employed

Employer Name: _____

Employer Address: _____

Occupation: _____

For Qualified Accounts: Beneficiary Information (optional)

Beneficiary Name: _____

Relationship to Account Owner: _____

Beneficiary Social Security Number: _____

Beneficiary Date of Birth: _____

Percentage: _____

Beneficiary Name: _____

Relationship to Account Owner: _____

Beneficiary Social Security Number: _____

Beneficiary Date of Birth: _____

Percentage: _____

Spousal Consent: I am the IRA holder's spouse and I approve and consent to the naming of a primary beneficiary other than myself.

Spouse's Signature

Date

If naming contingent beneficiaries, please attach a separate sheet.