

# ADVISORY TRUST

## ON-LINE PORTFOLIO AND ON-LINE STATEMENT ENROLLMENT FORM

By signing below, I am requesting access to The Advisory Trust Company's On-Line Portfolio and On-Line Statement services. I understand that Advisory Trust will notify me by email when my statement is available and provide me with a link to [AdvisoryTrustCo.com](http://AdvisoryTrustCo.com) to securely access the statements, and that it is my responsibility to notify Advisory Trust of any change to my e-mail address by updating my Profile on [AdvisoryTrustCo.com](http://AdvisoryTrustCo.com).

**Name:** \_\_\_\_\_  
(FIRST, MIDDLE, LAST)

**Company Name:** \_\_\_\_\_  
(IF APPLICABLE)

**Address:** \_\_\_\_\_  
(STREET ADDRESS)  
\_\_\_\_\_  
(CITY, STATE, ZIP)

Relationship to the Trust(s)	
<input type="checkbox"/>	Trustor
<input type="checkbox"/>	Co-Trustee
<input type="checkbox"/>	Beneficiary
<input type="checkbox"/>	Financial Advisor
<input type="checkbox"/>	Other (please specify) _____

### Authorized On-Line Account Users

Name (First, Last)	Phone	Email	Security Answer (mothers maiden name, 4-digit pin, city/town of birth, or pet's name)	User ID First Choice (must contain 6 - 8 characters)	User ID Second Choice (must contain 6-8 characters)

\_\_\_\_\_  
CLIENT SIGNATURE DATE

\_\_\_\_\_  
JOINT ACCOUNT HOLDER SIGNATURE DATE

### ACCOUNTS AND PORTFOLIOS (For Internal Use Only) (OLP Number \_\_\_\_\_ OLP Set-Up Initials: \_\_\_\_\_ Date: \_\_\_\_\_)

ACCOUNT NUMBERS	PORTFOLIOS ALL / SPECIFIC #'s	ACCOUNT NUMBERS	PORTFOLIOS ALL / SPECIFIC #'s	ACCOUNT NUMBERS	PORTFOLIOS ALL / SPECIFIC #'s
	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

\_\_\_\_\_  
TRUST ADMINISTRATOR (PLEASE PRINT)

\_\_\_\_\_  
TRUST ADMINISTRATOR SIGNATURE DATE

**Please send this form to On-Line Support Services:**

**Mail:** On-Line Portfolio Enrollment  
P.O. Box 628 (MS-2301)  
Wilmington, DE 19899-9982  
**Fax:** 302-636-6330