



Please [complete this form via DocuSign](#) or email it to service@freedomadvisors.com.

Use this form to group your accounts for Freedom reports and portal access.

1. Account Owner Name

Account Owner/Trustee/Custodian/Executor

Co-Account Owner/Co-Trustee/Co-Custodian/Co-Executor

2. Account Numbers to be Householded

*Account owners are able to access all information for every account grouped in a Household.

3. Owner Signature(s)

The undersigned account owner(s) hereby direct Freedom Investment Management to effect the instructions and/or changes as directed by this LOI.

	/	/
Account Owner/Trustee/Custodian/Executor	Date	MM DD YYYY
	/	/
Account Owner/Co-Trustee/Co-Custodian/Co-Executor	Date	MM DD YYYY
	/	/
Account Owner/Co-Trustee/Co-Custodian/Co-Executor	Date	MM DD YYYY
	/	/
Account Owner/Co-Trustee/Co-Custodian/Co-Executor	Date	MM DD YYYY

*All account owners to be included in the household must sign this form.