

# RAYMOND JAMES

Branch

IA#

Statement Linking allows clients to group accounts with a common mailing address together in one convenient envelope.

**Each account owner for all accounts being statement linked must sign below.**

By signing below, you are requesting that Raymond James Ltd. or its agents (“we” or “us”) send account statements for your accounts and the accounts of others identified below (the “other account holders”) together to a common address (“consolidate your statements”). You acknowledge that if we consolidate your statements, the other account holders may have access to your account statements and your personal information that those statements contain. You consent to us disclosing personal information about you to the other account holders to the extent we require to consolidate your statements.

**Account Information**

New Consolidation

Add Account(s)  mail group # \_\_\_\_\_

Remove Account(s)  mail group # \_\_\_\_\_

\*Ensure you provide your proper account number. Check your account statement and/or contact your Advisor.

\***Add On Accounts:** add on accounts will not automatically be linked to preexisting linked accounts. Please complete and sign a new form to link statements.

\*If a change of address is necessary, please complete a change of address form.

\*Estate and investment club accounts are **not eligible** for consolidation.

Optional: provide the name which you would like to appear in your envelope address window (for example: The Smith Family): \_\_\_\_\_

List of all Applicable Account(s) for Statement Linking:

Additional Account(s) for Statement Linking:

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

11.	
12.	
13.	
14.	
15.	
16.	
17.	
18.	
19.	
20.	

List of all Applicable Client(s) Names:

List of all Applicable Clients Signature(s):

\_\_\_\_\_  
Client Name:

\_\_\_\_\_  
Client Name:

\_\_\_\_\_  
Client Name:

\_\_\_\_\_  
Client Name:

\_\_\_\_\_  
Client Name:

\_\_\_\_\_  
Client Signature:

\_\_\_\_\_  
Client Signature:

\_\_\_\_\_  
Client Signature:

\_\_\_\_\_  
Client Signature:

\_\_\_\_\_  
Client Signature:

\_\_\_\_\_  
Date (mm/dd/yyyy)

\_\_\_\_\_  
Signature of Advisor