



You must complete this authorization form to allow your Interested Party to gain access to your account information. Please be advised a verbal confirmation is required to verify this request. Once your document has been processed we will send you an email requesting your verbal confirmation.

Please complete and submit this form via one of the following methods:

Mail: Madison Administration Company, One Paragon Drive, Suite 275, Montvale, NJ 07645 • **Fax:** (845) 947-1212 • **Secure Upload:** www.madisontrust.com/uploads

A. ACCOUNTHOLDER INFORMATION

Full name Account number

B. B. ADD AN INTERESTED PARTY TO MY ACCOUNT

An Interested Party is authorized to access account information but is not authorized to provide directions.

Interested Party Contact Information

Name Email address

Firm/company name (required) Phone number Fax number

Mailing address City State ZIP

Firm/company EIN (required)

Do you want the Interested Party to be included on all email communications?

- Yes – The above listed party should be included in all email correspondence.
- No – The above listed party shall be contacted upon request and not automatically copied on all email correspondence.

C. REMOVE AN INTERESTED PARTY

Please remove the following Interested Party from my account: _____

D. ACKNOWLEDGMENT & SIGNATURE

By signing below, I hereby authorize Madison Trust as Custodian, and their affiliates, to allow the aforementioned Interested Party, or any individual working for the aforementioned firm/company, to:

- Access my account information, including copies of my account statements, tax filings and online account information.
- Contact Madison Trust to discuss my account holdings and activity.

Accountholder signature Date

Please Note: For verification purposes the Representative will need to provide the client's Madison Trust account number and the last four digits of the clients Social Security Number each time they call in. In addition, the Representative will be asked for the Interested Party contact information. Once verbally confirmed, the email address will be considered verified and have access to all account information until we are directed otherwise. If you have any questions please contact our Support Team 800-721-4900.