



## Householding Request Form

Clients have the ability to “household” their accounts held with Vision. This allows clients to review their financial records more concisely while reducing the number of mailings to their address. By linking accounts under a household relationship, clients who receive paper month-end account statements will receive only one envelope each month.

Vision will automatically consolidate accounts with the same social security number into one household statement. Use this form to add additional accounts with the same mailing address into your household statement. In that one envelope will be all of their accounts with a single cover sheet that lists each account and the respective pertinent information.

In addition, this service ensures that all accounts householded together will be accessible via our Web site using only a single account login (i.e., clients can login via one username and see each of their householded accounts).

### 1. Primary Account

Identify the “Primary Account” in your household.

\_\_\_\_\_  
Primary Account Name

\_\_\_\_\_  
Primary Account Number

### 2. Household Accounts

List all of the account names and numbers of accounts you would like included in your household mailings. All accounts in your household must have the same mailing address as the “Primary Account” listed in Section 1.

A. \_\_\_\_\_  
Name Number

B. \_\_\_\_\_  
Name Number

C. \_\_\_\_\_  
Name Number

D. \_\_\_\_\_  
Name Number

E. \_\_\_\_\_  
Name Number

F. \_\_\_\_\_  
Name Number

### 3. Signatures

Each account owner, trustee, custodian or authorized individual must sign this form to authorize Vision to consolidate into one envelope mailings of month-end account statements for the above-listed accounts.



**Please Sign and Date Below**

I authorize Vision to link the requested accounts to the Primary Account for the household mailings. I understand that the consolidated mailings will be addressed to the Primary Account in the household. I acknowledge that information on all of the householded accounts will be made available for viewing by Primary Account owner. Householding does not give the Primary Account owner any authority over other accounts, but allows that owner to view information both via month-end statements and/or Web access.

**X** \_\_\_\_\_  
Primary Account Owner Signature Date \_\_\_\_\_  
\_\_\_\_\_  
Print Name Account Number \_\_\_\_\_

**A. X** \_\_\_\_\_  
Account Owner Signature Date \_\_\_\_\_  
\_\_\_\_\_  
Print Name Account Number \_\_\_\_\_

**B. X** \_\_\_\_\_  
Account Owner Signature Date \_\_\_\_\_  
\_\_\_\_\_  
Print Name Account Number \_\_\_\_\_

**C. X** \_\_\_\_\_  
Account Owner Signature Date \_\_\_\_\_  
\_\_\_\_\_  
Print Name Account Number \_\_\_\_\_

**D. X** \_\_\_\_\_  
Account Owner Signature Date \_\_\_\_\_  
\_\_\_\_\_  
Print Name Account Number \_\_\_\_\_

**E. X** \_\_\_\_\_  
Account Owner Signature Date \_\_\_\_\_  
\_\_\_\_\_  
Print Name Account Number \_\_\_\_\_

**F. X** \_\_\_\_\_  
Account Owner Signature Date \_\_\_\_\_  
\_\_\_\_\_  
Print Name Account Number \_\_\_\_\_

**Attach additional sheets as necessary.**

Please return this completed form to your Financial Advisor or Vision's Client Services team via e-mail ([clientservices@visionfinancialmarkets.com](mailto:clientservices@visionfinancialmarkets.com)) or fax at 203.388.2669.