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In connection with the services provided by Servicer, you may direct that information related to the accounts custodied at TD Ameritrade and/or other Confidential Information be provided by TD Ameritrade to Servicer. "Confidential Information" herein is deemed to include confidential client, business, financial or technical information, or data proprietary to you that is competitively and commercially valuable to you and not generally known, or available by legal means, to third parties. Servicer in turn may use the Confidential Information to enable you to access client information as part of the services it provides to you. TD Ameritrade and Servicer have entered into a Confidentiality Agreement in connection with the services provided that protects the confidentiality of TD Ameritrade confidential information.

Your signature below will acknowledge your agreement to the release by TD Ameritrade of Confidential Information to Servicer relating to your Advisor customers. You further hereby represent that you have obtained from your Advisor customers all authorizations necessary for release of this information in a manner consistent with applicable privacy laws and regulations. You agree to indemnify and hold harmless TD Ameritrade from and against any and all claims arising in connection with this agreement and TD Ameritrade reliance thereon.

Please indicate your agreement to the foregoing by signing and returning a copy of this agreement to TD Ameritrade Technology Services at [instapi-pmsupport@tdameritrade.com](mailto:instapi-pmsupport@tdameritrade.com) or fax # 866-226-4617.

Acknowledged and agreed.

Veo® User IDs: \_\_\_\_\_

Advisor Code(s): \_\_\_\_\_

Printed Name of Authorized Signer: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Mailing Address:  
**TD Ameritrade Institutional**  
PO BOX 650567  
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TDAI 9289 REV. 02/17

Investment Products: Not FDIC Insured \* No Bank Guarantee \* May Lose Value

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