Client Portal Communication Consent

This form provides your consent for your financial advisor and their firm to use the client portal for all communications regarding your accounts and financial planning. Please read the following information and indicate your preferences.

Consent to Electronic Communication

I acknowledge that communications may include account information, statements, recommendations, documents, and other correspondence related to my financial matters.

- [ ] I consent to receiving communications through the client portal.

Withdrawal of Consent

I understand I can withdraw my consent to electronic communication at any time by notifying my advisor in writing.

Preferred Communication Methods

- [ ] Client Portal
- [ ] Email
- [ ] Phone
- [ ] Regular Mail

Client Signature

Name:

Signature:

Date: