

Client Authorization to Disclose Personally Identifiable Information

This form authorizes Global Retirement Partners, LLC and its investment advisory representatives associated with (collectively “Investment Advisor”) to disclose personally identifiable information (“PII”) to a third party, such as your tax or legal advisor, relative or other individual upon your request.

This form may not be used for any of the following purposes:

- To disclose verification of account balance and deposits to a third party
- To give trading authorization
- To add an interested party to received duplicate statement
- To add a trusted contact person

This form is for Investment Advisor use only and must be retained in the client file.

1. Account Information

Account Name	Account Number

2. Authorization

I hereby authorize Investment Advisor to provide the following information upon request to the individual(s) identified in section 3 (select all that apply):

Any information regarding the account or client
 Account Distribution/Frequency
 Account Balance
 Tax Information (Ex: 1099)
 Statement

Special Instructions

3. Disclose Information to

Individual/Firm/Third Party Service Provider Name	Relationship to Account Holder
Address	Phone Number

4. Permission Expiration No Expiration Specify Date

5. Acknowledgement

Client, by signing below, on behalf of himself/herself/itself and any affiliates, officers, directors, employees, advisors and agents, shall hold harmless and indemnify Investment Advisor, and their affiliates, officers, directors, employees and agents from and against any and all claims, actions, damages, liabilities, costs and expenses, including reasonable attorneys’ fees and expenses, arising from or relating to any third party or regulatory action, suit or claim arising from any matter involving this Client Authorization to Disclose Personally Identifiable Information.

_____	_____	_____
Account Holder Signature	Account Holder (print)	Date
_____	_____	_____
Account Holder Signature	Account Holder (print)	Date