



SagePoint Financial, Inc.
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800.552.3319

VISION2020Advisor Trade Confirmation Suppression

I. INSTRUCTIONS

To suppress the mailing of separate trade confirmations for your discretionary wrap fee managed account(s), complete and sign this form, and submit it to SagePoint Financial, Inc. Each account registration must complete a separate form to suppress trade confirmations. In lieu of separate trade confirmations, information from the confirmation will be reported at least monthly via the brokerage account statement. You can obtain, upon request to SagePoint Financial, Inc. and at no additional charge, trade-by-trade confirmations for any transaction since the last monthly statement, any subsequent transactions, or any transactions effected for up to a one-year period preceding the last monthly statement. You may also receive an interim update and further details concerning any transaction effected between statement periods without charge by contacting your representative or by viewing your account online.

II. ACCOUNT INFORMATION

ACCOUNT REGISTRATION (Please print): _____

ACCOUNT NUMBER(S): _____

III. AUTHORIZATION

I (we) do not want to receive a separate confirmation of each transaction for the account(s) listed above. Accordingly, by signing below, I (we) direct SagePoint Financial, Inc. and Pershing, LLC to discontinue mailing separate trade confirmations to me (us), for the account(s) listed above. I (we) understand and acknowledge that:

- I (we) will not pay a different fee based on my (our) decision to execute this document.
- Executing this document is not a condition to my (our) entering into or continuing participation in a wrap free program.
- I (we) can rescind this instruction to discontinue mailing of trade confirmations at any time.

All joint account owners/trustees must sign below.

ACCOUNT OWNER/TRUSTEE SIGNATURE: _____

DATE: _____

JOINT ACCOUNT OWNER/TRUSTEE (IF ANY) SIGNATURE: _____

DATE: _____