



ADVISORY SERVICES LLC

# Change of Representative

2655 1st Street, Suite 250, Simi Valley, CA 93065 | Tel (800) 473-3856 | Fax (800) 636-1302

Change of:  Representative Date \_\_\_\_\_

Platform or Money Manager: \_\_\_\_\_

This form authorizes HBW Advisory Services to change the Representative of record. This shall take effect immediately upon receipt of this form. The account numbers that will be affected by this change are as follows.

### Customer Name and Address:

\_\_\_\_\_  
\_\_\_\_\_

Client name: \_\_\_\_\_ Account Number: \_\_\_\_\_

Client name: \_\_\_\_\_ Account Number: \_\_\_\_\_

Client name: \_\_\_\_\_ Account Number: \_\_\_\_\_

Client name: \_\_\_\_\_ Account Number: \_\_\_\_\_

**Current (old) Representative of Record:** \_\_\_\_\_

**New Representative of Record:** \_\_\_\_\_

**HBW Rep No.** \_\_\_\_\_

**Authorized Signature:** \_\_\_\_\_

**Authorized Signature:** \_\_\_\_\_

**Representative Signature:** \_\_\_\_\_

**Home Office Signature:** \_\_\_\_\_