



ADVISORY SERVICES LLC

# Subsequent Trade Slip

PO Box 2049, Simi Valley, CA, 93062 | Tel (800) 473-3856 | Fax (800) 636-1302

## Representative Information

Rep name : \_\_\_\_\_

Rep number : \_\_\_\_\_

Rep Signature : \_\_\_\_\_

Date : \_\_\_\_\_

## Investment Information

Solicited       Unsolicited

Customer name : \_\_\_\_\_

Fund company name : \_\_\_\_\_

Account registration type : \_\_\_\_\_

Fund acct # / VA contract # : \_\_\_\_\_

Products / Funds :		

Delivery Method :  Mail       Fax       Courier       Other: \_\_\_\_\_

Transaction Type :  Buy       Sell

Exchange To : \_\_\_\_\_ From: \_\_\_\_\_

Transaction Amount : \_\_\_\_\_

Method of payment :  Transfer       Phone       Online       Check # \_\_\_\_\_

Date sent : \_\_\_\_\_

## Home Office Use Only

Date received : \_\_\_\_\_

Method received : \_\_\_\_\_

Principal signature : \_\_\_\_\_