WESTON FINANCIAL

CLIENT PORTAL AUTHORIZATION FORM

SECTION A – Client Portal Access: We are pleased to offer the benefits and convenience of accessing all your Weston Financial managed investment account(s), including accounts added in the future, online through the Weston Client Portal. We require client consent to enable access to account information via the Internet. Our Client Portal requires a working email address which will become your "username" for log-in. We will also use this email for communication purposes.

Please complete one of the following two sections. ***By signing this form you authorize Weston to establish online access.***

1) Individual Ownership Only:

Name:	**Email Address:**
Signature:	**Date:**

2) Household Ownership – applicable to spouses/partners (combination of individual and/or joint account ownership):

Name:	**Email Address:**
Grant viewing access to spouse/partner named below *if that person wants separate log-in/access*: ____YES or ____NO	
Signature:	**Date:**

Name:	**Email Address (*only provide if want separate log-in/access*):**
Grant viewing access to spouse/partner named above: ____YES or ____NO	
Signature:	**Date:**

SECTION B – Interested Party Access to a Non Household Owner: Client(s) authorize Weston to provide access to their account(s) to an interested party (*e.g., Trustee, Attorney, Accountant*). We require client consent to enable access to account information via the Internet.

Interested Party Name and Relationship to Client	**Email Address**	**Provide Specific Account numbers or indicate "All Accounts," including future accounts**

Client Name:	**Signature:**	**Date:**
Client Name (if Household):	**Signature:**	**Date:**

Please Note: Accessing the Client Portal requires a compatible web browser. Weston does not sell or support any web browser, and it is the client's responsibility to purchase, install and maintain all necessary web browser software to utilize access to the Client Portal. The Client Portal provides clients with aggregated information from underlying custodians. Certain information such as cost basis, may not always be current and should not be relied on when making tax decisions. Access to your Weston accounts through the Client Portal may exclude accounts held with The Washington Trust Company.

For Weston Financial Use Only:

*Counselor Signoff:*____ *Date:* _________________________

Co-Counselor notified of client request(s) ☐