

Designation of Investment Advisor

Instructions to Account Holders: Complete this form to add or remove an Investment Advisor to your Quest Trust Company (QTC) account(s).

This form must be accompanied by a Certificate evidencing the Investment Advisor's current registration as required under the Investment Advisor's Act of 1940 (i.e. registration with the U.S. Securities and Exchange Commission (SEC) or state authority).

ACCOUNT HOLDER INFORMATION

Name:	Account Number(s):
Select one:	
<input type="radio"/> Please remove the current Investment Advisor on the account(s) referenced in section A.	
<input type="radio"/> Please add the Investment Advisor listed below in Section B to the account(s) referenced in section A.	

INVESTMENT ADVISOR INFORMATION

Name:	Name of Firm:	
Email:	Primary Phone Number:	
Address:	City, State, Zip Code:	
Advisor Number:	Dealer Number:	Branch Number:

ACCOUNT AUTHORIZATION, ACKNOWLEDGMENT, AND SIGNATURES

By this Designation of Financial Advisor, I hereby authorize and direct QTC to share my financial account information ("Account Information") to the Investment Advisor at the Investment Firm listed in Section B. Account Information includes but is not limited to: account balance, statements, transfers, rollovers, contributions, and distributions. QTC may furnish Account Information to the Investment Advisor and their firm electronically or by a delivery method deemed most feasible by QTC. QTC reserves the right to sole discretion in determining the most feasible method of delivery. I understand the Investment Advisor is my agent as the account holder, and not an agent of QTC. I understand the Investment Advisor, and not QTC, is a fiduciary to my account. I understand I am responsible for any and all diligence with regard to the Investment Advisor and their Investment Firm. If my Investment Advisor is affiliated with a firm, QTC may make available and furnish account information to my Investment Advisor's firm as set forth above. If my Investment Advisor changes firm or affiliations, my Investment Advisor will continue to have the same authority on my account unless I notify QTC in writing of the change by submitting a new Designation of Investment Advisor form. I understand it is my sole responsibility to notify QTC of any changes with respect to the change of firm or affiliation.

I acknowledge it is my sole responsibility to direct investments for the account(s) and QTC has no responsibility or involvement in evaluating or selecting any assets or investments, and shall have no liability for any loss, damage, tax (including a prohibited transaction tax or plan disqualification tax), or claim (including tort or fraud and reasonable attorneys' fees) that may result or be associated with any transactions directed by the account holder and their Investment Advisor. I agree to indemnify and hold QTC harmless from and against any and all claims, liabilities, causes of action, losses, and expenses asserted or incurred by QTC in any way relating to any action directed by the any authorized party on my account(s), including any Investment Advisor(s).

I acknowledge and agree that QTC may construe any and all investment directions given by the Investment Advisor has having been authorized by the account holder. QTC reserves the right to rely on any and all representations made by the Investment Advisor in connection with a sale or purchase of investment on behalf of my account, including but not limited to: representations with regard to directing investments, prohibited transactions, and suitability requirements. I understand the Investment Advisor is not authorized execute any documentation on my behalf, nor to change any beneficiaries, direct distributions or transfers, nor change account holder information for the Custodial Account(s) indicated in Section A. I understand that QTC does not monitor the registration status of my Investment Advisor and/or their Investment Firm. If the registration status of my Investment advisor terminates or changes any time after the Investment Advisor has been designated as the Investment Advisor on my account, it is my sole responsibility to notify QTC immediately in writing with a new Designation of Investment Advisor form of the change as well as to provide the registration status of the new Investment Advisor.

Removal of Investment Advisor:

I hereby authorize and direct QTC to remove the Investment Advisor identified in Section B. I understand the removal is effective only upon submission of a timely and fully completed form. QTC will provide written notice of effective date of termination. The termination of authorization shall not have any effect on any instruction, direction, or approval provided to QTC prior to the Termination Date.

Account Holder's Signature:	Date:
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I, the intended Investment Advisor, understand that a Registered Investment Advisor cannot be added to any account as a beneficiary. I represent and warrant the following: I am registered as an investment advisor with the Securities Exchange Commission (SEC) and under the laws of each state in which I intend to do business; or that I am either: exempt from such registration or a registered representative of a licensed broker/dealer who is duly authorized to serve in such capacity for the account(s) listed in section A. I certify to the best of my knowledge that no proceeding, enforcement action, disciplinary action, or arbitration by or before the SEC or any self-regulatory organization is pending against me. I agree to indemnify and hold QTC harmless for any loss, cost, or damage (including reasonable attorneys' fees) resulting from acting upon any verbal, written, or electronic instructions QTC believes to have originated from me or any other authorized individual in connection with this designation.

Investment Advisor's Signature:	Date:
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