

Account Transfer Letter of Authorization Form

Use this form to provide a physical signature when the transferring firm will not accept an electronic signature.

Instructions

1. Fill out the required fields by typing in the information.
2. Print and sign the form (additional signatures required for accounts with more than one owner).
3. Send us the completed and signed form:

Scan and Email

support@folioinstitutional.com

Fax

703-649-6288

U.S. Mail

Folio Institutional

8180 Greensboro Drive, 8th Floor

McLean, VA 22102

If you need assistance, call us at **1-888-485-3456**.



PART 1: Folio Institutional Account Information

Name	Account Owner/Custodian/Trustee	Co-Account Owner/Custodian/Trustee
Account Number		

PART 2: Authorization and Signature

Instructions for Transferring Firm:

Please accept this letter as authorization to honor the Folio Institutional transfer recently initiated online. In the event the account holds Money Market Funds, **please liquidate and send cash.**

Please be advised that the Federal Electronic Signature Act legislation took effect on 1 October 2000, and gives electronic signatures the same status as a formal signature on a paper document. The Act is quoted below:

SECTION 1. SHORT TITLE. This Act may be cited as the "Electronic Signatures in Global and National Commerce Act".

TITLE I—VALIDITY OF ELECTRONIC RECORDS AND SIGNATURES FOR COMMERCE SEC. 101. GENERAL RULE OF VALIDITY.

GENERAL RULE.—With respect to any contract or agreement entered into in or affecting interstate or foreign commerce—

- a. no statute, regulation, or other rule of law shall deny the legal effect of such contract or agreement on the ground that the instrument is not in writing if the instrument is an electronic record; and
- b. no statute, regulation, or other rule of law shall deny the legal effect of such contract or agreement on the ground that the contract or agreement is not signed or is not affirmed by a signature if the contract or agreement is signed or affirmed by an electronic signature.

IF THIS IS A JOINT ACCOUNT, BOTH TENANTS MUST SIGN BELOW.

Account Owner/ Custodian/Trustee	X	Date (mm/dd/yyyy) / /
Co-Account Owner/ Custodian/Trustee	X	Date (mm/dd/yyyy) / /