

Jefferson National Customer Billing Agreement

Use this form to have your client authorize Folio Institutional to debit the designated Folio Institutional account for amounts due to pay for services for the specified Jefferson National Account.

Instructions

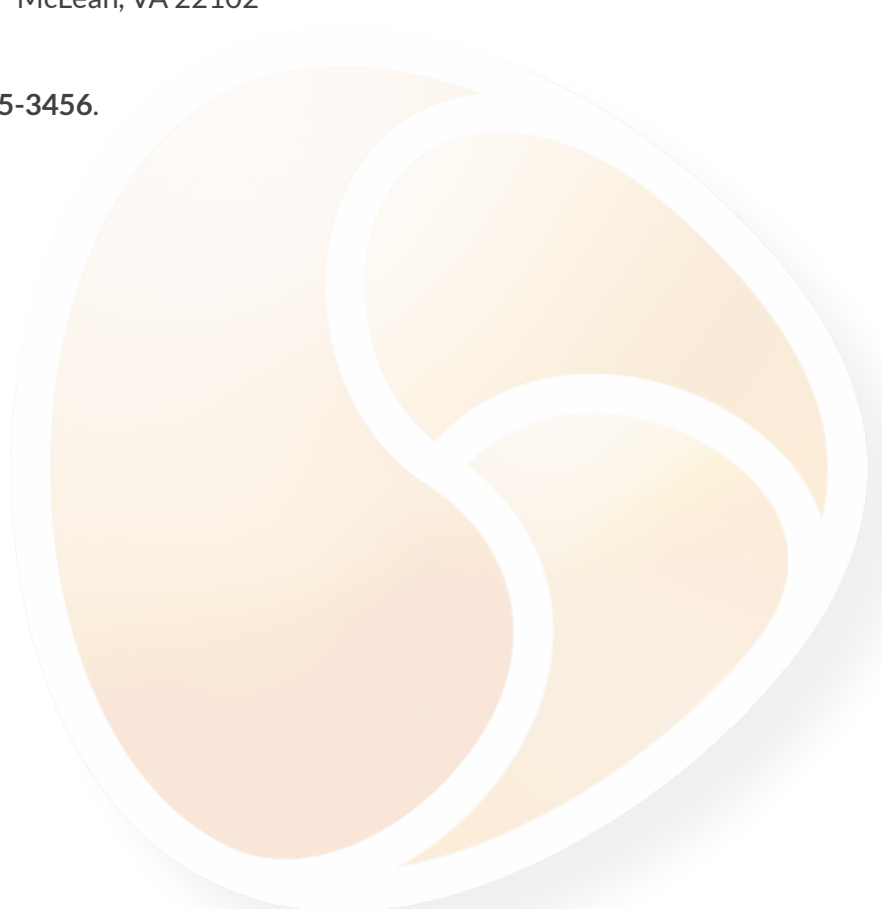
1. Complete all fields on this form for your firm.
2. Once signed, submit this form to us:

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**.



Folio Institutional may charge my advisor’s asset-based fees and Folio Institutional’s service fees, both of which are calculated based on my assets held with Jefferson National, to my Folio Institutional account specified below. These fees will be retained by Folio Institutional and/or remitted to my advisor as applicable.

Jefferson National will in addition assess its fees from the assets I have invested in their products as outlined in any contract that I have with them.

| | | |
|---|---|--------------|
| Folio Institutional Account | Account Number | Account Type |
| Other Account (if applicable) | Jefferson National Account or Policy Number | |

Signature(s)

I/We hereby authorize and direct Folio Institutional to debit the designated Folio Institutional account for amounts due as described above, and submit those funds to the appropriate parties to pay for advisory and reporting services for the above specified Jefferson National Account.

All account owners must sign below.

| | | |
|------------------------------|-----------------------|--------------------------|
| Primary Owner/Trustee | Print Name | Date (mm/dd/yyyy) / / |
| | Signature X | |

| | | |
|-------------------------|-----------------------|--------------------------|
| Co-Owner/Trustee | Print Name | Date (mm/dd/yyyy) / / |
| | Signature X | |