



Questions? Call 1-877-495-8246

**Permissions**  
Add/Update -  
Remove/Retain -

**Instructions:** Complete this form to add, update, remove, or retain a Contact(s) and/or their permissions. All Contacts must be previously established with FL PALM. To establish a new Contact, please complete the **FL PALM Contact Record** form along with this document.

**PARTICIPANT/INVESTOR INFORMATION and ACCOUNTS:**

Participant/Investor Name: \_\_\_\_\_ TIN: \_\_\_\_\_

Please list the Account number(s) or Account title(s) to which this form applies:

- |          |          |          |           |
|----------|----------|----------|-----------|
| 1. _____ | 4. _____ | 7. _____ | 10. _____ |
| 2. _____ | 5. _____ | 8. _____ | 11. _____ |
| 3. _____ | 6. _____ | 9. _____ | 12. _____ |

**ADD/UPDATE:** (Please complete the information below to add or update each Contact's permissions for the Accounts listed above.)

1. CONTACT INFORMATION: (Contact must be previously established with the Fund)	CONTACT PERMISSIONS: (Please select all permissions that apply)
<p>Contact Name: _____ First and Last Name (Print)</p> <p>Mailing Address: _____ Agency Name (If Applicable)</p> <p>_____ Address _____</p> <p>_____ City _____ State _____ Zip _____</p>	<p>For the new Fund Account being established, this Contact may:</p> <ul style="list-style-type: none"> <li>View Account information.</li> <li>Initiate transactions.</li> <li>Open and close Accounts.</li> <li>Change banking instructions and Account information.</li> <li>Assign permissions to and establish other Contacts.</li> <li>Receive electronic statements.</li> <li>Receive paper statements.</li> </ul> <p><i>*Contact must be on record. All new Contacts must complete a Contact Record form.</i></p>

2. CONTACT INFORMATION: (Contact must be previously established with the Fund)	CONTACT PERMISSIONS: (Please select all permissions that apply)
<p>Contact Name: _____ First and Last Name (Print)</p> <p>Mailing Address: _____ Agency Name (If Applicable)</p> <p>_____ Address _____</p> <p>_____ City _____ State _____ Zip _____</p>	<p>For the new Fund Account being established, this Contact may:</p> <ul style="list-style-type: none"> <li>View Account information.</li> <li>Initiate transactions.</li> <li>Open and close Accounts.</li> <li>Change banking instructions and Account information.</li> <li>Assign permissions to and establish other Contacts.</li> <li>Receive electronic statements.</li> <li>Receive paper statements.</li> </ul> <p><i>*Contact must be on record. All new Contacts must complete a Contact Record form.</i></p>

**REMOVE: Contacts to be removed from the Accounts listed above.**

1. Contact Name: \_\_\_\_\_  
First and Last Name (Print)
2. Contact Name: \_\_\_\_\_  
First and Last Name (Print)
3. Contact Name: \_\_\_\_\_  
First and Last Name (Print)
4. Contact Name: \_\_\_\_\_  
First and Last Name (Print)
5. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

**RETAIN: Contacts to remain on Accounts listed above with no changes.**

1. Contact Name: \_\_\_\_\_  
First and Last Name (Print)
2. Contact Name: \_\_\_\_\_  
First and Last Name (Print)
3. Contact Name: \_\_\_\_\_  
First and Last Name (Print)
4. Contact Name: \_\_\_\_\_  
First and Last Name (Print)
5. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

**CERTIFICATION:** (The person who signs this section verifies the information listed above is correct.)

The person signing below should be as follows:

- For existing Accounts this section must be signed by an individual who is currently authorized to designate other Contacts as per Fund records.
- If submitted with a New Participant/Investor Application, this section must be signed by the individual who signed the certification section of the New Participant/Investor Application.
- If submitted with a Trusteed Account Application, this section must be signed by the individual who signed the signature section of the Trusteed Account Application.
- The Fund reserves the right to request proof of authority in the form of election certification, board minutes, resolutions, fiduciary Fund agreement, etc. when updating permissions in Fund records. It is the sole responsibility of the Participant/Investor to promptly notify FL PALM of any changes to authorized Contacts.

Authorized Signature \_\_\_\_\_

Date \_\_\_\_\_

Print Name of Authorized Signatory \_\_\_\_\_

Phone Number \_\_\_\_\_

**Any document containing sensitive information received by email will not be accepted. Please send by uploading through Connect, fax, or mail.**

**SEND VIA CONNECT:** Log in to Account Access  
Existing Connect Click  Secure Contact  
Users Only Select file to upload - Send message

**FAX TO:** FL PALM Client Services Group  
1-800-252-9551

**MAIL TO:** FL PALM Client Services Group  
P.O. Box 11813  
Harrisburg, PA 17108

FUND USE ONLY	
V2022.03	INITIALS
Processed	
Confirmed	



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# Addendum to Permissions

Add/Update -  
Remove/Retain -

**Instructions:** Complete this form when you need to add, update, remove, or retain more Contacts and/or their permissions. If this addendum is needed, it must accompany the Permissions form.

**ADD/UPDATE PERMISSIONS:** *(Please complete the information below to add or update each Contact's permissions.)*

**3. CONTACT INFORMATION: (Contact must be previously established with the Fund)**      **CONTACT PERMISSIONS: (Please select all permissions that apply)**

<p>Contact Name: _____ First and Last Name (Print)</p> <p>Mailing Address: _____ Agency Name (If Applicable)</p> <p>_____ Address _____</p> <p>_____ City _____ State _____ Zip _____</p>	<p>For the new Fund Account being established, this Contact may:</p> <ul style="list-style-type: none"> <li>View Account information.</li> <li>Initiate transactions.</li> <li>Open and close Accounts.</li> <li>Change banking instructions and Account information.</li> <li>Assign permissions to and establish other Contacts.</li> <li>Receive electronic statements.</li> <li>Receive paper statements.</li> </ul> <p><i>*Contact must be on record. All new Contacts must complete a Contact Record form.</i></p>
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**4. CONTACT INFORMATION: (Contact must be previously established with the Fund)**      **CONTACT PERMISSIONS: (Please select all permissions that apply)**

<p>Contact Name: _____ First and Last Name (Print)</p> <p>Mailing Address: _____ Agency Name (If Applicable)</p> <p>_____ Address _____</p> <p>_____ City _____ State _____ Zip _____</p>	<p>For the new Fund Account being established, this Contact may:</p> <ul style="list-style-type: none"> <li>View Account information.</li> <li>Initiate transactions.</li> <li>Open and close Accounts.</li> <li>Change banking instructions and Account information.</li> <li>Assign permissions to and establish other Contacts.</li> <li>Receive electronic statements.</li> <li>Receive paper statements.</li> </ul> <p><i>*Contact must be on record. All new Contacts must complete a Contact Record form.</i></p>
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**5. CONTACT INFORMATION: (Contact must be previously established with the Fund)**      **CONTACT PERMISSIONS: (Please select all permissions that apply)**

<p>Contact Name: _____ First and Last Name (Print)</p> <p>Mailing Address: _____ Agency Name (If Applicable)</p> <p>_____ Address _____</p> <p>_____ City _____ State _____ Zip _____</p>	<p>For the new Fund Account being established, this Contact may:</p> <ul style="list-style-type: none"> <li>View Account information.</li> <li>Initiate transactions.</li> <li>Open and close Accounts.</li> <li>Change banking instructions and Account information.</li> <li>Assign permissions to and establish other Contacts.</li> <li>Receive electronic statements.</li> <li>Receive paper statements.</li> </ul> <p><i>*Contact must be on record. All new Contacts must complete a Contact Record form.</i></p>
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**6. CONTACT INFORMATION: (Contact must be previously established with the Fund)**      **CONTACT PERMISSIONS: (Please select all permissions that apply)**

<p>Contact Name: _____ First and Last Name (Print)</p> <p>Mailing Address: _____ Agency Name (If Applicable)</p> <p>_____ Address _____</p> <p>_____ City _____ State _____ Zip _____</p>	<p>For the new Fund Account being established, this Contact may:</p> <ul style="list-style-type: none"> <li>View Account information.</li> <li>Initiate transactions.</li> <li>Open and close Accounts.</li> <li>Change banking instructions and Account information.</li> <li>Assign permissions to and establish other Contacts.</li> <li>Receive electronic statements.</li> <li>Receive paper statements.</li> </ul> <p><i>*Contact must be on record. All new Contacts must complete a Contact Record form.</i></p>
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**REMOVE: Contacts to be removed from the Accounts listed above.**

6. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

7. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

8. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

9. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

10. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

**RETAIN: Contacts to remain on Accounts listed above with no changes.**

6. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

7. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

8. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

9. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

10. Contact Name: \_\_\_\_\_  
First and Last Name (Print)

*Any document containing sensitive information received by email will not be accepted. Please send by uploading through Connect, fax, or mail.*

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Existing Connect Click  Secure Contact  
Users Only Select file to upload - Send message

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