



Outside Account Access Form

Account title _____

Account number _____

Custodian (i.e. Schwab, Fidelity, etc.) _____

Custodian website address _____

User ID _____

Password _____

Client phone number _____

Client email address _____

I, _____, grant Lifestyle Asset Management, Inc. ("LSAM"), and any sub-advisor assigned for management of my account by LSAM, permission to access my account using the information stated above to view account holdings, account history, and enter transactions to manage my account as set forth in my Investment Advisory Agreement and Client Profile Form.

Signature _____

Printed Name _____

Date _____