



IRONSHIELD
FINANCIAL PLANNING

*Helping you manage what
you can't afford to lose™*

Request For Secure Online Statement Access

I, _____ am requesting access to view my account statements via the "FundEX Investor Web" online statement website.

I am aware that I will only be able to access information through my own unique login on accounts that I am registered on title for unless I expressly consent to permit my information to be consolidated under one household master login.

ID Verification

Name: _____

Email: _____ (User ID and Password will be emailed to this address)

Address: _____

Please answer the following security question that will be registered on your account:

What is your favourite number? Answer: _____

Signature: _____

Date: _____

Please fax this form to 416-626-2717.

Once your account has been verified and activated, a User ID and Temporary Password will be emailed to the email address listed on this form.



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Request To Consolidate Accounts Under One Login ID (Information Sharing Consent Form)

To: FundEX Investments Inc.

Please consolidate all of the accounts for the following clients to have viewing access, via the internet, of their account information with your firm.

Full Name of Client #1 (please print)

Full Name of Client #2 (please print)

Full Name of Client #3 (please print)

Full Name of Client #4 (please print)

Please consolidate the account information for all clients listed above so that it all appears under the login ID for the following client (a.k.a. Household Master Login):

Full Name of Client (please print)

I also understand that this consent may be revoked by me, at any time, by notifying you in writing.

Signature of Client #1

Signature of Client #2

Signature of Client #3

Signature of Client #4

Today's Date