

Account Linking Request

My Account

<input style="width: 95%;" type="text"/> Account Number	<input style="width: 95%;" type="text"/> Account Name
<input style="width: 95%;" type="text"/> Phone Number	<input style="width: 95%;" type="text"/> Contact Email Address

Give Access to

<input style="width: 95%;" type="text"/> Account Number	<input style="width: 95%;" type="text"/> Account Name
<input style="width: 95%;" type="text"/> Username	Access Level: <input type="checkbox"/> Viewing <input type="checkbox"/> Trading
<input style="width: 95%;" type="text"/> Reason for linking	<input style="width: 95%;" type="text"/> Relationship

Required Documents:

- A copy of your valid government-issued photo ID (non-U.S. residents, please use passport).
- For linking a third party only, please make sure to also send a notarized [Trading Authorization form](#) and a copy of authorized-agent's valid government-issued photo ID.

Please submit all documents via one of the following methods:

- Document Upload:
 Web: Login to your account, go to *Customer Service > Form Center > Upload Form* to upload our documents.
 Mobile App: Tap the *Account* icon on the bottom right corner, then tap *Contact Us > Send Secure Documents*.
- Email: service@firstrade.com

Signature(s)	
<p>This request is an agreement and authorization by the Account Holder(s) ("you") to permit the User ID making this link account request to trade in your account as long as the User ID of the other party is linked to your account. You agree to accept all risk and responsibility entailed in this request, including, but not limited to, agents or third parties who may have access to the subject account(s) and any online documents (e.g. statements, trade confirmations, prospectuses, tax documents, and corporate reports, proxies, reorganization notices). No on-line requests are accepted for address changes, check requests and any other account profile modifications. You agree to indemnify and hold Firstrade Securities, its officers, directors, employees and agents harmless from and against any loss, liability, claim, damage or expense arising from the request to link the subject account(s), including but not limited to your authorization of the identified party(ies) to transact on the subject account(s), your responsibility for retaining confidentiality of your account access information, and Firstrade Securities' ability to place a restriction on your account at its sole discretion. You agree that this Agreement, together with all other agreements relating to your account(s), including the Firstrade Customer Agreement, made between you and Firstrade Securities continue to bind you.</p>	
<input style="width: 95%;" type="text"/> Primary Account Holder Signature	<input style="width: 95%;" type="text"/> Date
<input style="width: 95%;" type="text"/> Joint Account Holder Signature (if applicable)	<input style="width: 95%;" type="text"/> Date