



Interactive Brokers

The Professional's Gateway to the World's Markets

Please fill out all the fields, sign at the bottom and send to IB either via Fax to +1-312-542-6996 or via e-mail as scanned document to: accountmanagement@interactivebrokers.com

Authorization to (De-Link) Account from Financial Advisor

This form allows a customer to de-link their full IB account, including all cash and positions, from their self-selected Financial Advisor.

The following documentation must be included in support of this de-link request

1. Identification

- o Government-issued identification documents (e.g., passport, Driver's License)

2. A signed and dated copy of the Customer Agreement applicable to your account type with each page initialed. IB Customer Agreements can be found on our website at

<http://www.interactivebrokers.com/en/p.php?f=legalDocs>

3. Account holders must access their account via Account Management to ensure all account information is current, including their Investment Experience, Trading Objectives and Financial Information.

Important note: In order to hold an independent account at Interactive Brokers, clients are required to have a certain level of Investment Experience. ***Those accounts which do not meet the minimum requirements for an independent account will be unable to delink from their Financial Advisor.***

Please accept this letter of authorization to effectively remove the management of the client account identified below:

IB Account Number

IB Account Title

I understand and agree to the following terms and conditions:

1. I affirm and warrant that the undersigned have the authority to De-link the above account from its current Financial Advisor.
2. I understand that by De-linking the above account, my current advisor will no longer manage or trade the above account. I understand that I must therefore either manage and trade my account myself or retain another independent advisor to manage and trade my account. I also understand that if I wish to allow another advisor to manage and/or trade my account, I must comply with IB's procedures to link my account to that advisor.
3. I hereby represent, warrant and certify that the De-link to be effected pursuant to the above Transfer Instructions will be in full compliance with any applicable documents (e.g., Trust document, organizational documents, Financial Advisory agreements, etc.) and applicable law.
4. I hereby agree to indemnify and hold Interactive Brokers LLC and its affiliates, and their respective directors, officers, and employees (individually and collectively and Indemnified Party) harmless from and against any claim, loss, liability, cost and expense incurred (including but not limited to attorney fees, tax implications, liquidations, trading losses etc.) by such IB indemnified Party as a result of or arising from (i) IB effecting the de-link; or (ii) IB's reliance on these written instructions, including any representations made herein.

Signature of Primary Acct Holder / Trustee	Print Name	Date
Signature of Secondary Acct Holder / Beneficiary	Print Name	Date

Please allow 5-7 business days for the manual processing of requests submitted via this form to be completed.