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MATC Online Access Options

This form is designed to help you customize your view of multiple accounts into unique "households." Due to client confidentiality obligations, all persons who have an account(s) in your household group must sign below. The trustees of each trust account and all persons named on joint accounts must sign to authorize householding of online account views. (Not applicable to minors with custodial accounts.)

SECTION 1. ONLINE ACCESS OPTIONS:

A. Eliminate multiple User IDs for single account owner. Of my existing User IDs, I prefer to use this one to view all of my personal accounts: _____

B. Create a single account list of the following *account numbers* viewable to all clients listed in Section 2:

_____	_____	_____
_____	_____	_____
_____	_____	_____

C. Create a single account list for all SSNs below to all undersigned clients' user IDs

D. Create *new* user ID with access to all accounts for the SSNs below:

Proposed User ID: _____

Primary email address for new User ID: _____

(Please note: Mid Atlantic cannot guarantee the availability of a proposed User ID, but will do our best to honor your request. You will receive an automated email from MA TC informing you of the new User ID.)

SECTION 2. CLIENT INFORMATION:

1. Client name: _____ SSN/TIN: _____

Client Signature: _____ Date: _____

2. Client name: _____ SSN/TIN: _____

Client Signature: _____ Date: _____

3. Client name: _____ SSN/TIN: _____

Client Signature: _____ Date: _____

* If more than 3 account owners/trustees wish to combine access, please attach a complete list, with signatures.