

**PLEASE DESIGNATE AN ACTION FOR THIS FORM**

- I want to update contact information for my fund's current and successor advisors.
- I wish to appoint the following new successor advisor to my fund.
- I wish to remove the following successor advisor from my fund.

Fund Name

Advisor Name

**HOME INFORMATION - MARK IF THIS IS THE PREFERRED PLACE OF CONTACT**

Home Address

City

State

Zip

Home Phone

Home Fax

Cell/Alternate Phone

Home/Personal E-mail

**WORK INFORMATION - MARK IF THIS IS THE PREFERRED PLACE OF CONTACT**

Work Address

City

State

Zip

Work Phone

Work Fax

Cell/Alternate Phone

Work E-mail

Founder's Name (please print)

Founder's Signature

Date

Please include any additional comments: