

OPT-OUT FORM

Please note: If you have a joint account, your choice will apply to everyone on your account unless you tell us otherwise.

- Apply my choices only to me.
- I do not want my advisor to share my personal information with another financial institution if my advisor leaves Commonwealth; however, I understand that my advisor may disclose my name, address, phone number, title of my accounts, and my e-mail address to my advisor's new firm.

Name: _____

Address: _____

Account Number: _____

Mail to:

Commonwealth Financial Network, Attn: Privacy

29 Sawyer Road

Waltham, MA 02453-3483

OR

Call the Compliance Department: 800.251.0080, x9603