

# CUSTODIAN/ADVISOR APPLICATION ADDENDUM



APPLICANT NAME \_\_\_\_\_

**Financial Advisor Information**

NAME OF REFERRING FINANCIAL ADVISORY FIRM \_\_\_\_\_ REP/ADVISOR CRD NUMBER \_\_\_\_\_

REP/ADVISOR NAME \_\_\_\_\_ WORK PHONE \_\_\_\_\_ CELL PHONE \_\_\_\_\_

ADDRESS \_\_\_\_\_ EMAIL \_\_\_\_\_

**Financial Assistant Information**

NAME \_\_\_\_\_ EMAIL \_\_\_\_\_ WORK PHONE \_\_\_\_\_

**Preferred Contact for Additional Information**

Advisor    Assistant    Borrower

Borrower Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Special Notes: \_\_\_\_\_

**Delivery Method of Loan Documents to Client (Check All That Apply)**

Express Mail (Please include return label)    Email: \_\_\_\_\_

Advisor    Assistant    Borrower

CONTACT NAME (EXPRESS MAIL ONLY) \_\_\_\_\_ ADDRESS \_\_\_\_\_

Document Instructions: \_\_\_\_\_

**Custodian Information**

CUSTODIAN \_\_\_\_\_