



# Interested Party Designation

**NuView IRA - Processing Office**  
280 S. Ronald Reagan Blvd., Suite 200  
Longwood, FL 32750  
P: (407) 305-0683 | F: (321) 926-1156  
E: AccountUpdates@NuviewTrust.com

## 1 GENERAL INFORMATION

<b>Account Holder's Name</b> <input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Dr. _____	<b>NuView Account Number</b>
--	------------------------------

## 2 INTERESTED PARTY DESIGNATION

*Please complete the information below to authorize your spouse, financial advisor (broker, financial planner, accountant, attorney, or other person etc.) to receive information about your account. Please note that this individual will have unlimited access to your account information, but they will not be able to make changes to your account. This form must be completed in full and will only be accepted with account holder authorization.*

<b>Name of Interested Party</b>		
<b>Interested Party Street Address</b>		<b>City, State, Zip</b>
<b>Phone Number</b>	<b>Fax Number</b>	<b>Email Address</b>

Would you like the named interested party to be provided a login to view your account online?    Yes  No

This Designation will remain in effect until the Administrator has received written notice of revocation from the Account Holder. Account Holder agrees to indemnify and hold harmless Administrator, its affiliates, officers, employees and/or Custodian, against all claims, actions, costs and liabilities, including attorneys' fees, arising out of their reliance on this Designation. This indemnity and hold harmless provision shall survive any Termination of this Designation.

## 3 SIGNATURE AND ACKNOWLEDGEMENT

<b>Account Holder Signature:</b> _____	<b>Date:</b> _____
--	--------------------