



# CONTACT RECORD

Questions? Call 1-800-731-6830

**Instructions:** Complete this form to establish a new Contact and/or EON User with the Trust.

### CONTACT TYPE: (Please select a contact type.)

**Contact Type:** **Person** \*Individual to be established as a contact.

**Group** \_\_\_\_\_ \*Group of individuals that can only be established as a Statement Recipient.  
(Group Name)

### CONTACT INFORMATION: (Please fill this section out completely. If this Contact is a group, please fill out the second line of this section only.)

**First Name:** \_\_\_\_\_ **Last Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_  
Mr. Ms. Mrs.

**Email:** \_\_\_\_\_ **Phone:** \_\_\_\_\_ **Ext.** \_\_\_\_\_ **Mobile:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

### TRUSTEE INFORMATION: (If applicable, please enter the name of the Trustee.)

**Trustee Name:** \_\_\_\_\_

### EON USER INFORMATION: (Please fill this section out completely.) \*Group contacts will not be permitted EON access.

**Preferred/Current EON Username:** \_\_\_\_\_ (Client Services will contact you if your preferred Username is unavailable.)

Please select and answer **one** of the security questions below. Your answer to the selected question will be required to reset your password.

What is the name of your first pet?

What was the color of your first car?

In what city was your Mother born?

What is the middle name of your oldest child?

What is your Mother's maiden name?

What is the name of the street you grew up on?

What was your childhood nickname?

**Your answer:** \_\_\_\_\_

*\*Note: Your access to the Easy Online Network (EON) will be completed by the Client Services Group. You will receive an email from the EON Administrator (eonadministrator@pfm.com) confirming when your access is setup. The email will contain a temporary password for your initial login. You can login by visiting the IPDLAF+ Class website at [www.ipdlaf.org](http://www.ipdlaf.org). You will be prompted to change this password after you login. If you have any questions, please contact the IPDLAF+ Class Client Services Group at 1-800-731-6830.*

### SIGNATURE: (Please sign inside the box below for future verification purposes.)

Contact Signature

Print or Type Name of Contact

Date

*\*This form only establishes the individual above as a Contact in the records of the Trust. It does not give access to Investor accounts or establish a statement recipient. Please submit the IPDLAF+ Class Permissions Form to associate the Contact above to an Investor, assign permissions, and establish the individual as a statement recipient.*

**Any document received by email will not be accepted. Please send by fax or mail.**

**FAX TO:** IPDLAF+ Class Client Service Group  
1-888-535-0120

**MAIL TO:** IPDLAF+ Class Client Service Group  
P.O. Box 11760  
Harrisburg, PA 17108-1760

#### TRUST USE ONLY

V2015.04	DATE	INITIALS
Processed		
Confirmed		