

Account Heritage SDI

Prospectus Override Authorization:

Opt-In Access = Delivery / All Products

## Brokerage Account : Account Type

Account Type: Standard

Margin: Y

12B1 Fee Eligible: Y

Account Type Options:

Access Code:

Acronym:

Prime Broker:

RPN: 0

Selected Products:

- EQUITY
- GOVERNMENT
- MUNICIPAL
- FOREIGN EXCHANGE
- PIERPONT/MUTUAL FUND
- MORTGAGE BACKED
- EMERGING MARKETS
- OTC OPTION
- MONEY MARKET
- CORPORATE BOND

## Brokerage Account : Investment Objective

Investment Objective: Capital appreciation

Speculative Investments: Are Permitted

## Brokerage Account : JPM Use Only

This account is approved for the following types of transactions:

Exchange Traded Options:

Equity: Level 6: Combinations/Straddles

OTC Options:

Equity: Level 6: Combinations/Straddles

EM: Level 6: Combinations/Straddles

FX: Level 6: Combinations/Straddles

Debt: Level 6: Combinations/Straddles

Schedule: Brokerage