GRIMES & COMPANY
A REGISTERED INVESTMENT ADVISOR

OPTIONAL SERVICES FORM

1. Client Information

Client A Name (First, Middle Initial, Last)	**Client B (if applicable)** Name (First, Middle Initial, Last)		
Mailing Address	City	State	Zip
Primary Email Address			

2. Household Mailing Option

Would you like us to include all account statements mailed to the same household in one envelope?

The default mailing option is a separate envelope for each Grimes & Company quarterly account statement. (*Example: If you have a joint account and both individuals on the joint account also have IRA accounts, you now receive three separate envelopes containing each of the three separate account statements.*)

☐ **Yes**, please consider my/our signature(s) on Page 2 as my/our authorization to include all Grimes & Company account statements mailed to my/our household in one envelope. Note – each individual client who is included on an account registration must sign Page 2 to complete household mailing authorization.

☐ **No**, please send each quarterly Grimes & Company account statement in separate envelopes.

3. Go Paperless Option (eStatements)

Would you like to receive your Grimes & Company statements and other communication electronically?

The default delivery method for Grimes quarterly statement and other communication (tax documents, etc.) is U.S. Mail. Grimes & Company also offers electronic delivery to clients whom wish to access their account statements via online access. In order to participate in this program, you will need access to a personal computer, a Grimesco.com PIN, Internet access, and an Internet browser that is (HTML) JavaScript enabled. You may provide/update/remove your e-mail address or revoke your consent to receive documents electronically and request paper documents at any time by emailing advisors@grimesco.com or contacting our office at 508-366-3883.

By completing this section and signing on Page 2, you elect to participate in the e-Statements program and confirm that you can access the documents via Grimesco.com in Adobe® Reader® format without any additional hardware and software. If there is a material change in the hardware or software requirements, the revised requirements will be described and you will be given the opportunity to withdraw your consent without charge or imposition of any conditions or consequences. You will be asked again to consent to electronic delivery. If you choose to provide us with your e-mail address, you are able to receive e-mail messages containing electronic documents or e-mail notices that electronic documents are available for viewing online. E-mails sent by Grimes & Company do not contain any secure or confidential information. Grimes & Company does not give or sell customer information to other companies. Note – the e-Statements option is only available to individual clients or "Househeld" clients that complete section 2 above. Login information will be sent to the primary email address listed in section 1 above.

☐ **Yes**, please consider my/our signature(s) on Page 2 as my/our consent to receive and view virtually all communications with Grimes & Company (i.e. statements, tax documents, etc.) electronically via Grimesco.com instead of by U.S. Mail. I/We understand that my/our consent applies to my/our current and future accounts at Grimes & Company and is effective until further notice by Grimes & Company or until I/we change my/our mail preferences.

☐ **No**, I/we do not agree to the terms and/or do not want to view my/our Grimes & Company communications online. My/our signature(s) on Page 2 does not pertain to this section of the form.

4. Website Access Option

Would you like website access to your account information?

Grimes & Company offers website access to account information for clients free of charge. By completing this section and signing on Page 2 you elect to participate in the password-protected access portion of Grimes' Internet website. You understand that your participation will allow you to review certain investment-related information published by Grimes and unaffiliated third parties, is intended only to allow you access to information relative to your specific account, and will not provide you with the ability to direct account transactions (i.e. place orders, make withdrawals, etc.). Further, you understand that the password-protected section is a secure web site, that you will be assigned an individual password, and agree not to share your password with any other person.

Client A	Client B	
☐	☐	**Yes**, please consider my signature on Page 2 as authorization that I accept Grimes' website policy. I hereby release and hold Grimes harmless from any adverse consequences relative to any failure by me to keep the identity of my password secure. This authorization shall continue until canceled in writing.
☐	☐	**No**, I do not agree to the terms and/or do not want website access to my account information. My signature on Page 2 does not pertain to this section of the form.

5. Authorization to Release Information to Third-Parties

Would you like to authorize us to communicate with and provide information regarding your account(s) to anyone other than those listed on the account registration(s)?

Grimes & Company takes client privacy seriously. As part of our Privacy Policy, we do not share any personal or account information to any individual or company not listed on account registrations. ***Please note***, our privacy policy includes spouses/partners. We are unable to share account information with a spouse/partner if they are not listed on the account registration (i.e. IRA) without the owner's consent.

Client A	Client B	
☐	☐	**Yes**, please consider my signature below as authorization to communicate with and provide information regarding my account(s) to the individual(s) I have listed below. I understand that this authorization will stay in-force until I provide written notice to Grimes and Company to terminate any/all relationships.
☐	☐	**No**, I would like my information to remain confidential and not to be shared with any individual not listed on the account registration. My signature below does not pertain to this section of the form.

Authorized Individuals

☐ ☐ My spouse/partner whose contact information is listed in section 1

Name: ______________________ **Name:** ______________________

Relationship (i.e. CPA, attorney, child, etc.): __________ Relationship (i.e. CPA, attorney, child, etc.): __________

Address: ______________________ Address: ______________________

Telephone: __________ Email: __________ Telephone: __________ Email: __________

Name: ______________________ **Name:** ______________________

Relationship (i.e. CPA, attorney, child, etc.): __________ Relationship (i.e. CPA, attorney, child, etc.): __________

Address: ______________________ Address: ______________________

Telephone: __________ Email: __________ Telephone: __________ Email: __________

Client A Name ______________ Client A Signature ______________ Date ______________

Client B Name ______________ Client B Signature ______________ Date ______________

110 Turnpike Road, Suite 100 – Westborough, MA 01581
Tel (508) 366-3883 - Fax (508) 366-0999 - E-mail: advisors@grimesco.com