Fullscreen View On/Off Reset Form

SECURITY DESIGNATION FORM

IMPORTANT PLEASE READ: Your PIN Code is the key to accessing your account(s) information when speaking with a Client Service Representative. Equity Trust Company understands that privacy and security are very important. That is why we will not provide information about your account(s) to anyone without validating the PIN code you have chosen. In the event that you may forget your pin code we request that you please complete one of the security questions listed below. A member of our Client Service Team may use that question as an alternative to your PIN.

1 ACCOUNT INFORMATION

THIS FORM IS INTENDED TO:

☐ Change existing security information ☐ Establish security information

ACCOUNT HOLDER NAME		SOCIAL SECURITY NUMBER
ADDRESS		ACCOUNT NUMBER
CITY	STATE	ZIP CODE
PRIMARY DAYTIME PHONE NUMBER	E-MAIL ADDRESS	

2 CREATE A PIN NUMBER

A Confidential Six Digit PIN Number is required to access your account(s). You will need a PIN Number to access personal information on your account(s) when calling or accessing your account(s) online.

Confidential Six Digit Pin Number: ☐☐☐☐☐☐ *(Must Be Entirely Numeric)* 1 2 3 4 5 6

3 SELECT A SECURITY QUESTION

In case you forget your PIN Number, please select one of the following questions below and provide an answer. If you forget your PIN Number, this secret question can be used in place of the pin.

SECURITY QUESTIONS (PICK ONE)	
☐ What's my pet's name?	Answer:
☐ What's my mother's maiden name?	Answer:
☐ Where did I go to high school?	Answer:

SIGN & DATE

✕ _____ Account Holder's Signature Date

✕ _____ Custodian's Signature Date

P. O. BOX 451159 • WESTLAKE, OH 44145 • PHONE: 800-955-3434, option 2 • FAX: 440-365-1444 • EMAIL: IRASERVICES@EQUITYINSTITUTIONAL.COM