COLTRANE SECURITIES

# ON-LINE ACCESS ACTIVIATION FORM

CLEAR FORM

**Fax to 608-222-4242 or mail to:**
**Coltrane Securities**
**706 River Place. Madison. WI 53716**

## PRINCIPAL ACCOUNT:

| ACCOUNT NAME | ACCOUNT NUMBER |
|---|---|
| | |

## ADDITIONAL ACCOUNTS:

| ACCOUNT NAME | ACCOUNT NUMBER |
|---|---|
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Please provide you Internet E-Mail address: _____

When you access your accounts online, you will be asked for your user name (User ID) and password. Please indicate your choice of username and password below. NOTE this information is required to access your accounts on-line (PLEASE PRINT CLEARLY)

| | **User Name:** | **Password:** |
|---|---|---|
| First Choice: | _____ | _____ |
| Second Choice: | _____ | _____ |

Coltrane Securities will supply you with a temporary password via email to the email address indicated above when the account is activated for on-line viewing. When you log in for the first time you will be prompted to enter a permanent password.

## OPTIONAL COST BASIS INFORMATION

If you chose to have Coltrane enter the cost basis for your positions, complete the following (attach additional pages if necessary). Please note that the following charges are assessed for this service:
**Portfolio Services** $10 up to 25 positions **Research Services**: $25.00/hour, $25 minimum

| Symbol | # of Shares | Cost/Share | Date of Purchase (*) | Net Cost |
|---|---|---|---|---|
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*If information is not available, entry will indicate the date the account was opened or transferred.