**INTREPID FINANCIAL PLANNING GROUP LLC – FEE ACCOUNTS ONLY**
**PLEASE FORWARD WITH APPLICATION(S) AND INTREPID AGREEMENTS**

# NEW ACCOUNT NOTES/INSTRUCTIONS

DATE: _____ ADVISOR: _____

CLIENT NAME(S) _____

FEE ____% Intrepid Split: ____ Normal ____ 50-50 ____ Other

FEE/SPLIT COMMENTS _____

PORTFOLIO: _____ Include Stocks _____ Mutual Funds Only _____ Preferreds For Income

ESTIMATED TOTAL OF ALL ACCOUNTS $ _____

CHECKS FORWARDED TO TD AMERITRADE BY CLIENT:

A/C # _____ AMT _____ A/C # _____ AMT _____

A/C # _____ AMT _____ A/C # _____ AMT _____

## NOTES/INSTRUCTIONS

MONTHLY INCOME NEEDED BY CLIENT: AMOUNT $ _____

START DATE: _____ FROM WHICH ACCOUNT: _____

_____

_____

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