**[TO BE TYPED ON FIRM STATIONERY]**

# Letter to Clients - Trade Accommodation

**UNLESS sent via Certified or Overnite Mail-Return Receipt Requested, SEND via BOTH Regular and Electronic Mail (maintain confirmation of both).**

<Name>, <Title>

<Company Name>

<Address>

<City>, <Zip>

Re: Trade Accommodation (TD Ameritrade Account No. )

Dear \_\_\_\_\_\_\_\_\_:

The purpose of this letter is to confirm that on [insert date], you called Intrepid Financial Planning Group, LLC (“Intrepid”) to request that Intrepid purchase [insert number] shares of [company] in the above-referenced TD Ameritrade account, for which account Intrepid serves as an investment adviser. Although we prefer that clients seeking to direct the purchase of specific securities do so in a separate account, we have accommodated your request. However, to the extent that we have accommodated this and any future request, please understand that you, and not Intrepid, shall be solely responsible for determining the suitability or appropriateness of any directed transactions for your individual circumstances.  We shall not take responsibility for the performance of any such security, regardless of whether any such security is reflected on any supplemental account reports prepared by Intrepid. Thus, you will be responsible for both monitoring and making any decisions as to when and if to liquidate any such securities. The market value of any such security(ies) will (will not) be included in *assets under management* for purpose of determining Intrepid’s investment management fee. In consideration of this accommodation, you, on behalf of yourself, and each of your respective representatives, heirs, successors, and assigns, agree to release and hold harmless Intrepid, and all persons associated with Intrepid, from all losses and/or other liabilities resulting from such securities. **If you do not advise to the contrary, in writing, within seven (7) days from the date of this letter, you will have agreed to, and accepted, the terms and conditions set forth above.**

Sincerely,

**INTREPID FINANCIAL PLANNING GROUP, LLC**

By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_