



Dear Member,

Community First Credit Union & CUSO Financial Services L.P. members can easily access their Community First and CUSO Financial Services L.P. / Pershing Brokerage Accounts after logging in to the Community First's Online Banking web site. Please be aware that if you set up the link to view your Investment Accounts through Community First Credit Union Online Banking, everyone who has access to the COMMUNITY FIRST CREDIT UNION account will have access to the linked investment accounts. For example, if you have a joint deposit account with Community First Credit Union and an IRA Investment Account through CUSO Financial Services L.P., when you link these accounts all members with access to your selected Community First Credit Union Online Banking account will be able to view your IRA Investment Account.

This feature will be available upon the receipt and processing of the below "Clear 1 Client Account Link Authorization" form. For assistance in filling out the CFS form, Clear 1 Account Link Authorization form, please see the instructions below.

1. Account Holder Information boxes – please print the names of all Investment account holders.  
(If you need additional lines, print them on a second sheet of paper or on the bottom of the form.)
2. Credit Union Client ID box – print the Community First Credit Union account number that you wish to use for viewing the information through Community First Credit Union Online Banking.
3. Signature lines – please be sure that ALL Investment account holders sign this form.
4. Account Number under Signatures – print the Investment Account / Contract Number for each account holder.  
Example: Some of the numbers begin with "4Y4 or H25"
  - You will need to authorize each investment account you wish to link to Community First Credit Union Online Banking.
  - Please be aware that if you set up the link to view your Investment Accounts through Community First Credit Union Online Banking, everyone who has access to the COMMUNITY FIRST CREDIT UNION account will have access to the linked investment accounts.

You are able to link your Investment Account(s) to multiple Community First Credit Union Deposit Accounts for viewing through Community First Credit Union Online Banking by completing additional Clear 1 Account Link Authorization forms.

If you do not wish to set up the account link through the online banking site, you will be able to continue viewing your accounts through the Clear 1 Account Link Authorization internet site.

**Benefits and information about accessing the Clear 1 Client Portal site:**

The Clear 1 Client Portal site has enhanced security features. For security purposes, the first time you log on, you will be asked to:

1. Select an image
2. Enter a personal message
3. Choose and answer four security questions

The image and personal message will be used to confirm the authenticity of the server each time you log in to Clear 1 Client Portal. The questions will be used to authenticate you to the server when you log in from an unidentified computer. Please choose questions and remember your answers.

Failure to remember the answers will result in an inability for you to log in from an unidentified computer.

Please contact your Investment Services Financial Advisor at Community First Credit Union if you have questions about Clear 1 Client Portal or need to obtain additional forms. You are welcome to make copies of the form included in this document.

Sincerely,

Investment Services  
904.371.8076, option 9

Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a registered broker-dealer (Member FINRA/SIPC) and SEC Registered Investment Advisor. Products offered through CFS: **are not NCUA/NCUSIF or otherwise federally insured, are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal.** Investment Representatives are registered through CFS. Community First Credit Union of Florida has contracted with CFS to make non-deposit investment products and services available to credit union members.



CUSO Financial Services, L.P. (CFS)  
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 San Diego, CA 92131

**CUSO FINANCIAL SERVICES, L.P.**  
 Member FINRA/SIPC

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# Clear 1 Account Link Authorization

CFS 54-12

Get Contact Data

Clear All Fields

## 1 Account Holder Information





Credit Union Account Holder: First Name, Middle Initial	Last Name	Credit Union Account Holder's Client ID
Credit Union Account Co-Holder: First Name, Middle Initial, Last Name		Credit Union Account Co-Holder's Client ID

## 2 Authorization

I hereby authorize \_\_\_\_\_ (Name of CU Co-Holder) to link with my account(s) for viewing purposes only. I agree to indemnify and hold the Credit Union, CUSO Financial Services, L.P. and their affiliated companies harmless from any liability which may arise from the viewing of these accounts.

This authorization and indemnity shall remain in full force and effect until revoked by me by written notice, addressed to my financial representative and received at the Credit Union. This authorization and indemnity shall inure to the benefit of your present firm and of any successor firm or firms irrespective of any change or changes at any time in personnel for any cause whatsoever, and of the assignment of your present firm or any successor firm.

## 3 Signatures

 <b>1</b>	_____	_____
	SIGNATURE OF CREDIT UNION ACCOUNT HOLDER	CONTACT RECORD NUMBER
 <b>2</b>	_____	_____
	SIGNATURE OF CREDIT UNION ACCOUNT HOLDER	CONTACT RECORD NUMBER
 <b>3</b>	_____	_____
	SIGNATURE OF CREDIT UNION ACCOUNT HOLDER	CONTACT RECORD NUMBER
 <b>4</b>	_____	_____
	SIGNATURE OF CREDIT UNION ACCOUNT HOLDER	CONTACT RECORD NUMBER