



Please fill out all the fields, sign at the bottom and send to IB either via Fax to +1-312-542-6996 or via e-mail as scanned document to: [accountmanagement@interactivebrokers.com](mailto:accountmanagement@interactivebrokers.com)

### Authorization to (De-Link) Account from Financial Advisor

This form allows a customer to de-link their full IB account, including all cash and positions, from their self-selected Financial Advisor.

- 1. Identification:** Government-issued identification documents (e.g., passport, Driver's License)
- Account holders must access their account via Account Management to ensure all account information is current, including their Investment Experience, Trading Objectives and Financial Information.

**Important note:** In order to hold an independent account at Interactive Brokers, clients are required to have a certain level of Investment Experience. ***Those accounts which do not meet the minimum requirements for an independent account will be delinked from their Financial Advisor and restricted from opening new positions, but will be able to close existing positions. Please contact Customer Service for additional information.***

Please accept this letter of authorization to effectively remove the management of the client account identified below:

\_\_\_\_\_  
**IB Account Number**

\_\_\_\_\_  
**IB Account Title**

**I understand and agree to the following terms and conditions:**

- I have read and understand the IB Customer Agreement, which I signed when I opened my IB trading account and which is available on the IB website at <https://www.interactivebrokers.com/en/index.php?f=1552&ns=T>.  
**I understand that the Customer Agreement sets forth the terms and conditions for my IB account and I agree to abide by its terms.**
- I affirm and warrant that the undersigned have the authority to De-link the above account from its current Financial Advisor and my current Financial Advisor will no longer manage, trade or have access to the above account. I understand that I have the right to transfer my account to another broker or hire an independent financial advisor or introducing broker rather than trade my account myself but would prefer to trade my account directly and maintain it at Interactive Brokers. I understand that I must therefore manage and trade my account. I also understand that if I wish to allow another Financial Advisor to manage and/or trade my account, I must comply with IB's procedures to link my account to that advisor.
- I hereby represent, warrant and certify that the De-link to be effected pursuant to the above Transfer Instructions will be in full compliance with any applicable documents (e.g., Trust document, organizational documents, Financial Advisory agreements, Broker agreements, etc.) and applicable law.
- I hereby agree to indemnify and hold Interactive Brokers LLC and its affiliates, and their respective directors, officers, and employees (individually and collectively and Indemnified Party) harmless from and against any claim, loss, liability, cost and expense incurred (including but not limited to attorney fees, tax implications, liquidations, trading losses etc.) by such IB indemnified Party as a result of or arising from (i) IB effecting the de-link; or (ii) IB's reliance on these written instructions, including any representations made herein.

Signature of Primary Acct Holder / Trustee	Print Name	Date
Signature of Secondary Acct Holder / Beneficiary	Print Name	Date