HALBERT WEALTH MANAGEMENT
CHALLENGING WALL STREET'S CONVENTIONAL WISDOM

Agreement to Access Client Information

As Registered Owner, I hereby authorize the Designated Individual named below to have permission to inquire on any of my accounts or investments with Halbert Wealth Management, Inc. ("the Firm"). The Firm is authorized to provide account balances, positions, history, order status and any other account information to the Designated Individual. The Designated Individual is not permitted to place trades, authorize purchases or sales, change the address or request a disbursement from any of my accounts. The Firm shall assume no responsibility for reviewing or monitoring any activity of the Designated Individual. As Registered Owner, I hereby agree to indemnify and hold the Firm harmless from any and all losses or financial obligations that may arise from the acts or omissions of the Designated Individual.

This Agreement to Access Client Information is a continuing one and shall remain in full force and effect until written notice is delivered to the Firm of death, disability or incapacity of the Registered Owner or until revoked through written notice of revocation delivered to the Firm. **This authorization and indemnity shall be construed, administered and enforced according to the laws of the State of Texas, and shall inure to the benefit of the Firm and any successor firm or firms irrespective of any changes at any time in the personnel thereof for any cause whatsoever, and to the benefit of their affiliates and the assigns of the Firm or any successor firm.**

Designated Individual (Print Name): ____________________________

Relationship: ________________________

Registered Owner:

____
Print Name

____________________________________ ________________
Signature Date

____
Print Name (for Joint Accounts)

____________________________________ ________________
Signature Date