



INVESTMENT  
SERVICES LLC  
Member FINRA/SIPC

# FLEXINSURED ACCOUNT® FINANCIAL INSTITUTION EXEMPTION FORM

If you wish to exclude one or more of the Financial Institutions listed below, you may do so by placing a checkmark next to the Financial Institution name, completing the information at the bottom and returning the form to Cetera Investment Services LLC.

Account number: \_\_\_\_\_

## PARTICIPATING FINANCIAL INSTITUTION LIST

- |   |  |
|---|--|
| <input type="checkbox"/> Bank United, Miami Lakes, FL           | <input type="checkbox"/> Forbright Bank, Chevy Chase, MD                 |
| <input type="checkbox"/> Citibank, New York, NY                 | <input type="checkbox"/> Luana Savings Bank, Luana, IA                   |
| <input type="checkbox"/> Continental Bank, Salt Lake City, UT   | <input type="checkbox"/> Pinnacle Bank, Nashville, TN                    |
| <input type="checkbox"/> CTBC Bank Corp (USA), Los Angeles, CA  | <input type="checkbox"/> State Street Bank and Trust Company, Boston, MA |
| <input type="checkbox"/> Customers Bank, Phoenixville, PA       | <input type="checkbox"/> TriState Capital Bank, Pittsburgh, PA           |
| <input type="checkbox"/> Falcon National Bank, Foley, MN        | <input type="checkbox"/> Truist Bank, Lumberton, NC                      |
| <input type="checkbox"/> Fieldpoint Private Bank, Greenwich, CT | <input type="checkbox"/> United Community Bank, Blairsville, GA          |
| <input type="checkbox"/> First Guaranty Bank, Hammond, LA       | <input type="checkbox"/> Western Alliance Bank, Phoenix, AZ              |
| <input type="checkbox"/> Flagstar Bank, Troy, MI                |  |

\_\_\_\_\_  
Client Signature Date

\_\_\_\_\_  
Joint Client Signature Date

\_\_\_\_\_  
Additional Client Signature Date

\_\_\_\_\_  
Additional Client Signature Date

\_\_\_\_\_  
Print Financial Professional Name

**This form is required *only* if you choose to eliminate a financial institution from the FlexInsured Account.**

Deposits held in the FlexInsured Account® are not covered by SIPC.

Securities and insurance products are offered through Cetera Investment Services LLC (doing insurance business in CA as CFG STC Insurance Agency LLC), member FINRA/SIPC. Cetera Investment Services LLC is not affiliated with any financial institution where investment services are offered.

**Investments are: \*Not FDIC/NCUSIF insured \*May lose value \*Not financial institution guaranteed \*Not a deposit \*Not insured by any federal government agency.**

