



1607 Cherrywood Lane
Longwood, FL 32750
Phone: 407-682-4111
Fax: 407-682-5511
www.trustaged.org

On-Line Access Form

Trust Account / Client Name: _____

On-line access for viewing trust account balances, activity, and statements will be available via a secure portal to authorized individuals only. AGED reserves the right to determine who is an authorized individual for each account. Once a request is approved, AGED will issue a user name, temporary password and instructions for accessing the secure portal. Email notifications will be sent quarterly when statements are available for viewing.

Beneficiary Advocate / Individual requesting on-line access:

Name: _____

Email Address: _____

Telephone Number: _____

Please select one of the options below for printed statements:

Discontinue printed statements. I no longer wish to receive statements by mail. I will view my statements via the on-line secure portal.

Continue printed statements. I wish to have statements mailed to me as well as have access to view statements via the on-line secure portal.

Please sign and return this form to AGED using one of the following methods:

Mail: 1607 Cherrywood Lane, Longwood, FL 32750

Email: info@trustaged.org

Fax: 407-682-5511

Signature

Date

Printed Name

For Internal Use by AGED, Inc Staff				
<input type="checkbox"/> Server	<input type="checkbox"/> TM	<input type="checkbox"/> PAL	<input type="checkbox"/> Charlotte	<input type="checkbox"/> Logon Email