

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

**Subject: USA PATRIOT Act Disclosure and Acknowledgment**

Dear [Client Name],

To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account.

What this means for you: When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

By signing below, you acknowledge that you have received this notification and that the information provided to [Wealth Management Firm Name] is true and correct to the best of your knowledge.

**Client Acknowledgment:**

\_\_\_\_\_  
Signature of Client

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

Sincerely,

[Advisor Name]

[Wealth Management Firm Name]