

# CREDIT CARD AUTHORIZATION LETTER

I/We \_\_\_\_\_ hereby authorize  
(PRINT NAME AS IT APPEARS ON CREDIT CARD)

the use of my/our credit card described below for charges related to services provided by Comprehensive Wealth Management, LLC for management of the:

Qualified plan(s) set forth below: (Initial) \_\_\_\_\_

Annual Retainer (Initial) \_\_\_\_\_

I/We further understand that the annual retainer fee and/or quarterly qualified plan fee will be charged to my credit card on an ongoing basis until cancelled by me/us in writing.

Financial Planning Down Payment, *non-recurring* (Initial) \_\_\_\_\_

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Credit Card Type:  VISA  MASTERCARD

Credit Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ 3 Digit Security Code Number \_\_\_\_\_

Name of Card Holder(s): \_\_\_\_\_

I/We understand that the amount charged to my/our credit card is based on services requested by me/us at the rates stated in the Comprehensive Wealth Management LLC Investment Management Fee Agreement and/or pursuant to terms of Financial Planning Fee Agreement.

\_\_\_\_\_  
Signature 1

\_\_\_\_\_  
Signature 2

Date: \_\_\_\_\_

Date: \_\_\_\_\_