

Fidelity 403b — New Business Checklist

In order to do business with Lorence and Vander Zwart and Fidelity:

1. LVZ must have on file a signed Solicitors Agreement.

In addition to the form listed below, your broker dealer may have additional requirements such as requiring account information forms, third party disclosure documents or other requirements.

The following forms need to be completed and returned directly to LVZ to add third party management.

LVZ Investment Management Agreement Form

LVZ Investor Suitability Questionnaire

LVZ Solicitors Disclosure Brochure

Fidelity RIA Authorization Form



Did you know:

LVZ can fill out your paperwork for you with your client's consent?

The above forms are available on Laser App and our website?

Lorence & Vander Zwart
240 South River Ave
Holland, MI 49423

Ph: 800-851-724—www.lvzadvisors.com—Fax: 616-394-5986