



Money Movement Form

Complete and return to:
Brinker Capital Investments, LLC
17605 Wright St. Omaha, NE 68130
Telephone: 888.455.4244
Fax: 402.493.2811

This form should be utilized for establishing a systematic contribution/distribution. You will also need to complete TD Ameritrade's Move Money Advisor Authorization Form in conjunction with this form.

Your Account.

Account Name:

Account Number:

Money Movement Instructions. (Please select only one.)

☐ Establish New Instructions ☐ Update Existing Instructions ☐ Replace All Existing Instructions

Money Movement Type.

☐ Contribution _____ Contribution Year _____

☐ Distribution _____

Tax Withholding.

☐ Federal _____ % or \$ _____

☐ State _____ % or \$ _____

Transfer Information.

Start Date of Transfer: MM/DD/YYYY

Amount of Transaction:

Frequency of Transaction: ☐ One-Time ☐ Monthly ☐ Quarterly ☐ Annually

Special Instructions.

Certification and Signature. Please sign below.

Client: _____ Date: _____

Co-client: _____ Date: _____