



Return to:
CNL Client Services
PO Box 219001
Kansas City, MO 64121-9001

Overnight Delivery
CNL Client Services
801 Pennsylvania Avenue, Ste. 219001
Kansas City, MO 64105-1307

CNL Client Services
Toll-Free 866 650-0650
Fax 877 694-1116
Email CNLREIT@sscinc.com

Financial Professional Change

one Current Information

Financial Professionals may use this form to request a change in their Broker-Dealer firm or their Broker-Dealer address.

For Broker-Dealer changes, this form is not a **Block Transfer** and does not move existing clients with the Financial Professional. Each client must submit an Investor Change form to make this change.

For address changes, please notify your home office to ensure your address is properly

Name of Financial Professional(s)/Investor Representative(s)

Financial Professional Number/Team ID

Name of Broker-Dealer/Financial Institution

Mailing Address

City

State

Zip Code

Phone Number

Fax

Email Address

two

New Address and/or Broker-Dealer Information

Name of Financial Professional(s)/Investor Representative(s)

Financial Professional Number/Team ID

Name of Broker-Dealer/Financial Institution

Mailing Address

City

State

Zip Code

Phone Number

Fax

Email Address

three

Financial Professional/Investor Representative Signature(s)

Financial Professional signature(s) required to complete request.

Financial Professional/Investor Representative

Date

Additional Financial Professional /Investor Representative (if team)

Date