



LEVEL FOUR[®]
Financial
A DIVISION OF
LEVEL FOUR GROUP, LLC

12400 Coit Road, Ste 700
Dallas, TX 75251
866-834-1040 (office)
866-763-9136 (fax)

LFF132

Form #

N/A

Account #



LEVEL FOUR[®]
Advisory Services
A DIVISION OF
LEVEL FOUR GROUP, LLC

Branch #

FA #

Credit Card Payment Authorization

Please complete, sign and return this form as authorization for Level Four Financial, LLC or Level Four Advisory Services, LLC to process payments via credit card.

PLEASE EMAIL TO: accounting@levelfourfinancial.com

Cardholder Name: _____

Card Type: Visa MasterCard Discover American Express

Card Number: _____

Card Security Code: _____

Card Expiration Date: Month: _____ Year: _____

Amount: \$ _____

Billing Address: _____

Billing City: _____

Billing State: _____

Billing Zip Code: _____

Phone Number : _____

I, the undersigned, hereby authorize **Level Four Financial, LLC or Level Four Advisory Services, LLC** to charge the above amount to the card specified above. I agree to pay according to the terms and agreement of my credit card company. I further acknowledge that all transactions are charged a 2% processing fee.

Cardholder Signature

Date

Level Four Financial, LLC - Member FINRA & SIPC
Level Four Advisory Services, LLC – SEC registered Investment Advisor
Revised 11.2024

Level Four Group, LLC is a division of CRI Capital Group, LLC, a subsidiary of CRI Advisors, LLC. "CRI" is the brand name under which Carr, Riggs & Ingram, L.L.C. ("CPA Firm") and CRI Advisors, LLC ("Advisors") and its subsidiary entities provide professional services. CPA Firm and Advisors (and its subsidiary entities) practice as an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable law, regulations and professional standards. CPA Firm is a licensed independent CPA firm that provides attest services to its clients, and Advisors and its subsidiary entities provide tax and business consulting services to their clients. Advisors and its subsidiary entities are not licensed CPA firms.