

Communication Preference Form

Client Name: Jane Smith

Account Number: JS-ACC-12345

Contact Number: (123) 456-7890

Email Address: jane.smith@email.com

Preferred Communication Methods:

☒ Email

☒ Phone Call

☐ Text Message

☒ Physical Mail

Frequency of Account Updates:

☒ Monthly

☐ Quarterly

☐ Bi-annually

☐ Annually

Special Instructions:

Please refrain from calling on weekends or after 6 PM on weekdays.

Newsletter Subscription:

☒ Yes

☐ No

Consent:

By completing this form, you consent to receiving communications from Global Finance Solutions as per your selected preferences.

Signature:

Jane Smith _____ Date: _____