

Social Security Number --
Account Number -

Premiere Select® IRA Contributions by Electronic Funds Transfer (EFT)

This form will enable you to make IRA contributions electronically by transferring money from your bank account to your Premiere Select® Traditional IRA or Roth IRA (herein referred to as your "Premiere Select IRA"). Contributions made via EFT are **Current Year Contributions**. All contributions will be made to your Premiere Select IRA core money market mutual fund. You may also move money from the core money market mutual fund to any **existing** mutual fund(s) that you have in your Premiere Select IRA by completing Section 4 of this form. Please call your investment representative with any questions. **This service is not available for SEP-IRAs, SIMPLE IRAs and Keogh Money Purchase/Profit Sharing Plans. Please complete a separate form for each IRA to which you would like to make EFT contributions.**

Please return this form to your investment representative.

1 Customer Information

Print your name as it appears on your Premiere Select IRA statement or Application.

Name (First, Middle Initial, Last)
Home Phone Work Phone

2 Bank Information

Attach a voided check or complete the following information. **Passbook savings accounts** are not eligible. A common name must appear on both your bank account and your Premiere Select IRA.

Bank Name Name on your Bank Account
Bank ABA/Routing Number (Call your bank if you are unsure)
Bank Account Number
Account Type (check one) Checking Savings NOW/MMDA

3 Contribution Information

I hereby direct that \$ be transferred from my bank account designated above for each contribution period, as specified below and contributed to my Premiere Select IRA as indicated above, to my core money market mutual fund, as a **current year contribution(s)**. (Aggregate current year contributions to all IRAs, including Traditional IRAs and Roth IRAs, cannot exceed the annual contribution limit* or 100% of compensation, whichever is less.) Contributions will not be permitted more often than once per month, but must be made at least twice a year. You must wait 7 days for the first EFT contribution to be activated. The day specified below will default to the next business day if it falls on a holiday or weekend.

Frequency of contribution

Monthly on the day of every month beginning - (month-year).

OR

Quarterly on the day of every third month beginning - (month-year).

OR

Semi-annually on the day of every sixth month beginning - (month-year).

I understand this amount will be contributed to my Premiere Select IRA core money market mutual fund as a current year contribution and will remain in the core money market mutual fund unless a Periodic Investment Plan is specified in Section 4 or some other trade is placed.

* Please refer to the Premiere Select IRA Contribution Guide and consult with your investment representative to find the applicable maximum annual contribution limit and compute your periodic contribution amount. You are responsible for tracking your contributions for all IRAs to which you are contributing, and if you exceed the maximum IRA contribution limit, you may incur a penalty. If an IRA contribution is made by any means in addition to an EFT contribution, it will count towards your annual contribution limit and the systematic transfer of funds from the bank account listed in Section 2 may be suspended for the remaining calendar year. If your periodic EFT contributions are suspended prior to year end, the EFT will automatically resume in January of the following calendar year.



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4 Periodic Investment Plan — Optional

I would like the dollar amount transferred from my bank account to be allocated (according to the frequency specified below) from my core money market mutual fund to the following **existing** mutual fund positions held in my Premiere Select IRA (total percent specified below cannot exceed 100%; dollar amount cannot exceed the amount available in your core money market mutual fund). There may be a \$3.50 fee associated with each transaction; please contact your investment representative for additional information. Most mutual funds require a minimum investment of \$100.00; please refer to the fund prospectus.

	Fund Name	Fund Symbol	Percent	OR	Dollar Amount
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	\$ <input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	\$ <input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	\$ <input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	\$ <input type="text"/>

Frequency of Periodic Investments

Please indicate when you would like your investments made. Periodic investments will not be permitted more often than once per month, but must be made at least twice a year. The day specified will default to the next business day if it falls on a holiday or weekend.

I want the investments to be made:

Monthly on the day of every month beginning - (month-year).

OR

Quarterly on the day of every third month beginning - (month-year).

OR

Semi-annually on the day of every sixth month beginning - (month-year).

5 Authorization

I hereby authorize and request National Financial Services LLC ("NFS"), or its agents, or my Broker/Dealer to secure payment of amount indicated above to be invested by me by initiating debit entries to my account indicated in the bank named above (Bank). I authorize and request the Bank to accept any such debit entries initiated by NFS, or its agents, or my Broker/Dealer to such account and to credit such amount to my Premiere Select IRA indicated above as a current year contribution, without responsibility for the correctness thereof or the existence of any further authorization relating thereto. I hereby ratify any instructions given pursuant to this authorization and agree that neither NFS, nor its agents, nor my Broker/Dealer will be liable for any loss, liability, cost, expense, or claim for acting upon this authorization. It is understood that this authorization may be terminated by me (us) at any time by written notification received by NFS, or its agents, or my Broker/Dealer. Any such notification shall be effective only with respect to entries initiated after receipt of such notification and a reasonable time to act on it.

IRA Owner/Authorized Signator

Date

Signature of Bank Account Co-holder (if applicable)

Date