

# Brokerage Investment and Redemption Form



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Use this form to add bank account instructions to your brokerage account and/or establish automatic investments or redemptions on your brokerage account.

**For investments:**

- Before automatically investing into a mutual fund, you must first meet the fund's minimum investment. Some mutual funds are not eligible for automatic investments. Please refer to your prospectus for details.
- IRA holders: Deposits to your American Century Investments® brokerage IRA are counted as current year contributions only. Previous year contributions should be sent by mail or made by calling us.

**For redemptions:**

- To establish an automatic redemption, you must maintain sufficient money in your money market sweep fund to cover the periodic redemptions and account minimums.

**Please print clearly in CAPITAL letters using black ink.**

## **1 Provide Your Account Information**

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4MV-

Brokerage account number

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Mr. / Mrs. / Ms.    Owner's first name

Middle initial

Owner's last name

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Mr. / Mrs. / Ms.    Joint owner's first name

Middle initial

Joint owner's last name



## 4 Establish Automatic Redemptions (voided preprinted check is required)

To establish an automatic redemption from your brokerage account, please provide the information below.

**Type (check one):**

New request       Change to existing request

**Frequency (check one):**

Semimonthly       Monthly       Bimonthly       Quarterly       Semiannually       Annually

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Start date (month-day-year) **Please allow two weeks for mail time and processing of this form.**

- We will execute transactions based on the start date you have indicated.
- For monthly redemptions, we'll make your redemption on the 15th of the month, unless you specify another date on the line above.
- If the date you select falls on a weekend or a holiday, we'll make the investment on the next business day.

**Options (check one):**

Redeem from my **money market sweep fund to my bank account** (\$25 minimum) — **proceed to step 5.**

\$ \_\_\_\_\_

Amount

Redeem from my **mutual fund(s) to my bank account.** (\$100 minimum). Automatic redemptions setup from mutual funds will be initiated to the bank five business days after the redemption to allow time for the funds to settle — **proceed to step 5.**

\$ \_\_\_\_\_

Fund name

Amount

\$ \_\_\_\_\_

Fund name

Amount

Send dividends from my account positions to my bank. Dividends/interest from your sweep account will not be included, and income will not be paid if it is less than \$25 for the period. **The amount withdrawn may vary each period depending on the income activity. If you are not sure of your dividend settings or you would like to change your dividend settings, please contact us — proceed to step 5.**

## 5 Provide Your Voided Preprinted Check

In order to begin your investment/redemption, it is necessary to provide us with a voided preprinted check (or a copy of a voided preprinted check). A valid deposit slip is acceptable for savings accounts only. Generally your bank account and brokerage account must be identically registered using the exact same name(s). Please attach below.

## 6 Bank AND Brokerage Account Owners Sign Your Name

I (we) hereby authorize Pershing LLC, a subsidiary of The Bank of New York Mellon Corporation (Pershing), to initiate credit/debit entries to the bank account indicated on this form and also initiate, if necessary, credit/debit entries and adjustments for any entries in error. I (we) further authorize my (our) bank to credit/debit entries to such account.

In consideration of American Century Brokerage, its employees or agents providing the services established on this form, I agree to defend, hold harmless and indemnify American Century Brokerage, its officers, agents, employees, affiliates and successors from all losses, claims, expenses and liabilities that any of them may suffer arising from, or as a result of, American Century Brokerage's acceptance of transaction instructions through these services.

I understand that neither American Century Brokerage nor any affiliated companies shall be responsible or liable for any damages related to online service including, but not limited to, those caused by theft, unauthorized access, failure of electronic or mechanical equipment, communications line failure, telephone or interconnectivity problems, or other occurrences beyond their control.

This authority is to remain in full force and effect until Pershing, through American Century Brokerage, has received notification from me (or either of us) of its termination in such time and in such manner as to afford Pershing and the bank a reasonable opportunity to act on it. It is understood that the purpose of this authorization is to provide a means of payment/purchase of securities through American Century Brokerage.

**ALL BROKERAGE** account owners **and ALL BANK** account owners must sign below.



\_\_\_\_\_  
Signature (Owner)

\_\_\_\_\_  
Date



\_\_\_\_\_  
Signature (Joint Owner or Additional bank account owner)

\_\_\_\_\_  
Date



\_\_\_\_\_  
Signature (Joint Owner or Additional bank account owner)

\_\_\_\_\_  
Date



\_\_\_\_\_  
Signature (Joint Owner or Additional bank account owner)

\_\_\_\_\_  
Date