



Account Privileges Change Form

Overnight Delivery:
Palmer Square Funds
803 W. Michigan St.
Milwaukee, WI 53233-2301

Regular Mail:
Palmer Square Funds
P.O. Box 2175
Milwaukee, WI 53201-2175

1. CURRENT ACCOUNT INFORMATION

Changes will apply to the following accounts:

Fund Account Number

Fund Account Number

Fund Account Number

Fund Account Number

SSN or TIN

Name(s) on Account

2. BANK INFORMATION

This form must be received at least 14 days prior to your initial transaction to establish and confirm your bank information. You must attach a blank, voided check from your bank account to this form. If you are adding or changing bank information after your account has been established, a Medallion signature guarantee is required.

I would like to: Add Change Bank Information

Bank Name

Bank Address

ABA Routing Number Account Number

Name(s) on Bank Account

Account Type

Checking Account Savings Account

I authorize the bank listed above for:

- Electronic Funds Transfer (takes 2 – 3 business days)
- Wire (\$15 Fee – takes 1 business day)

3. TELEPHONE OPTIONS

A Medallion signature guarantee is required to add telephone exchange or redemption privileges.

Add Delete

Telephone Redemption. Permits the redemption of a minimum of \$500 and a maximum of \$50,000. A minimum of \$2,500 must remain in your account to keep it open.

4. AUTOMATIC INVESTMENT PLAN

If you are adding or changing your bank information, please complete Section 2. Minimum additions to the Fund for auto investments are \$100. Automatic investments can be made on the 5th and/or 20th of each month.

I would like to:

Add Change Automatic Investment Plan

Monthly Quarterly (Jan., Apr., July, Oct./Feb., May, Aug., Nov./Mar., June, Sept., Dec.)

Begin investment on mm/yy

5th 20th \$ _____
Fund Amount

5th 20th \$ _____
Fund Amount

5th 20th \$ _____
Fund Amount

Your automatic investment will be withdrawn directly from your checking or savings account named in Section 2 on the date you have selected or the first business day thereafter. You will be assessed a \$25 fee if the automatic investment cannot be made for any reason. If no date is selected, purchases will be made on the 20th of each month.

