

S·e·l·e·c·t Link[®]

A Complete Financial Picture



- 2 The Summary of Accounts section lists each of the linked accounts, including the account description, the account number, and the registration of each account. This section also provides the value of each account, the percentage of total assets for each account, and the entire market value (or net worth) of all accounts included in the SelectLink summary.
- 3 The Summary of Asset Allocation section summarizes the value of each type of investment held in your linked accounts, along with the percentage that each asset category represents.

Additional Statement Mailing Alternatives

- > **Combined Mail.** If you would like to have multiple account statements in your household included in the same envelope, but not summarized in the SelectLink summary, you can enroll in our Combined Mail service by completing the attached application and selecting the “Combined Mail” option.
- > **Interested Parties.** If you would like to receive Interested Party statements for accounts held outside of your residence within your SelectLink and/or Combined Mail package, you can enroll in our Interested Party service by completing the attached application and selecting the “Interested Party” option. If you do not want to take advantage of the SelectLink or Combined Mail services, but you would like to establish an Interested Party mailing, contact your investment professional or financial organization.

LINK YOUR ACCOUNTS TODAY

To sign up for SelectLink, complete the enclosed application (only one residence per application) and separate it at the perforations.

Return the application to your investment professional or financial organization.

¹ SelectLink can consolidate all accounts sharing the same mailing address from an individual firm in a single mailing. However, accounts from multiple firms with the same address will be distributed in one mailing per firm.

SELECTLINK[®] COMBINED MAIL APPLICATION

Please provide the following information for the accounts to be included in your SelectLink and/or Combined Mail statement package. As you complete this form, keep in mind that **to qualify for the SelectLink and Combined Mail options, all accounts must have the same mailing address.**

Identify the accounts that you would like to include in the SelectLink summary by checking the box in the "SelectLink" column. If you would like to have multiple account statements in your household included in the same envelope, but not consolidated on the SelectLink summary page, please mark the box in the "Combined Mail" column. If you would like to have copies of Interested Party statements included within your SelectLink and/or Combined Mail package, please select the box in the "Interested Party" column. **NOTE:** If you do not want to take advantage of the SelectLink or Combined Mail services, but you would like to establish an Interested Party mailing, contact your investment professional or financial organization.

The name of the first account indicated below will become the account to which all statements will be sent. Return the completed application to your investment professional or financial organization.

ACCOUNT INFORMATION (Please indicate the address of the first account, which will designate the primary mailing address)

NAME: _____

STREET ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

1

ACCOUNT NUMBER: -

SELECTLINK COMBINED MAIL INTERESTED PARTY

(Please check all that apply.)

Primary Account Owner's Signature

Joint Account Owner's Signature
(if applicable)

Additional Account Owner's Signature
(if applicable)

2

ACCOUNT NUMBER: -

SELECTLINK COMBINED MAIL INTERESTED PARTY

(Please check all that apply.)

Primary Account Owner's Signature

Joint Account Owner's Signature
(if applicable)

Additional Account Owner's Signature
(if applicable)

3

ACCOUNT NUMBER: -

SELECTLINK COMBINED MAIL INTERESTED PARTY

(Please check all that apply.)

Primary Account Owner's Signature

Joint Account Owner's Signature
(if applicable)

Additional Account Owner's Signature
(if applicable)



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4

ACCOUNT NUMBER: —

SELECTLINK COMBINED MAIL INTERESTED PARTY

(Please check all that apply.)

Primary Account Owner's Signature

Joint Account Owner's Signature
(if applicable)

Additional Account Owner's Signature
(if applicable)

5

ACCOUNT NUMBER: —

SELECTLINK COMBINED MAIL INTERESTED PARTY

(Please check all that apply.)

Primary Account Owner's Signature

Joint Account Owner's Signature
(if applicable)

Additional Account Owner's Signature
(if applicable)

6

ACCOUNT NUMBER: —

SELECTLINK COMBINED MAIL INTERESTED PARTY

(Please check all that apply.)

Primary Account Owner's Signature

Joint Account Owner's Signature
(if applicable)

Additional Account Owner's Signature
(if applicable)

7

ACCOUNT NUMBER: —

SELECTLINK COMBINED MAIL INTERESTED PARTY

(Please check all that apply.)

Primary Account Owner's Signature

Joint Account Owner's Signature
(if applicable)

Additional Account Owner's Signature
(if applicable)

8

ACCOUNT NUMBER: —

SELECTLINK COMBINED MAIL INTERESTED PARTY

(Please check all that apply.)

Primary Account Owner's Signature

Joint Account Owner's Signature
(if applicable)

Additional Account Owner's Signature
(if applicable)

Please note that ALL account owners' signatures are required.

Please check the box here and complete another copy of this form if you would like to combine more than eight accounts.

For Broker-Dealer Use Only

Correspondent Number

Group Name

Process by (Print Name)

Process By (Signature)

Date

