



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

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

Account Privileges Change Form

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 Min Acct Balance \$6,000 must remain in your account to keep it open.

4. Systematic Withdrawal Plan

If you are adding or changing your bank information, please complete Section 2. Minimum withdrawal for a Systematic Withdrawal Plan is \$500.

- Monthly
- Quarterly
- Semi-annually (indicate month to start)
- Annually (indicate month)

 Begin systematic withdrawal on (month, year)

5th 20th \$ _____
 Fund Amount

5th 20th \$ _____
 Fund Amount

5th 20th \$ _____
 Fund Amount

Payment Method (check one)

- Check to Address of Record
- Bank Information Currently on Account
- New Bank Information

Provisions of the Systematic Withdrawal Plan

SGA Funds Systematic Withdrawal Plan is available for any shareholder account worth at least \$10,000.

By completing this form, you are appointing SGA Funds as your agent to redeem shares in your account to make periodic payments.

Payments will be made by redeeming the appropriate number of shares in your account at the then current net asset value. Redemptions will be made on the 5th and/or 20th of each

