

# SelectLink<sup>®</sup> Combined Mail Application

Please provide the following information for the accounts to be included in your SelectLink and/or Combined Mail package. To qualify for the SelectLink and Combined Mail options, all accounts must have the same mailing address. The name of the first account indicated below will become the primary account to which all statements will be sent. Return the completed form to your investment professional or financial organization.

## STEP 1. ACCOUNT OWNER INFORMATION

Please indicate the address of the first account, which will designate the primary mailing address.

First Name	Middle Initial	Last Name
Street Address		
City	State	Zip/Postal Code

## STEP 2. DELIVERY OPTIONS

To have a consolidated summary report included with your account statements, identify the accounts that you would like included in the package by checking the "SelectLink" checkbox. If you do not wish to have a consolidated summary included with your statements, please check the "Combined Mail" checkbox.

If you would like to receive a combined mail package for statements in which you are the interested party with your own account statements, check the "Interested party" checkbox. Combined mail packages do not include a consolidated summary.

Add accounts to existing SelectLink group associated with the primary account listed as Account 1.

### Account 1 (primary mail-to account)

Account Number	Check all that apply: <input type="checkbox"/> SelectLink <input type="checkbox"/> Combined mail <input type="checkbox"/> Interested party	
Primary Account Owner Signature <b>X</b>	Joint Account Owner Signature (if applicable) <b>X</b>	Additional Account Owner Signature (if applicable) <b>X</b>

### Account 2

Account Number	Check all that apply: <input type="checkbox"/> SelectLink <input type="checkbox"/> Combined mail <input type="checkbox"/> Interested party	
Primary Account Owner Signature <b>X</b>	Joint Account Owner Signature (if applicable) <b>X</b>	Additional Account Owner Signature (if applicable) <b>X</b>

### Account 3

Account Number	Check all that apply: <input type="checkbox"/> SelectLink <input type="checkbox"/> Combined mail <input type="checkbox"/> Interested party	
Primary Account Owner Signature <b>X</b>	Joint Account Owner Signature (if applicable) <b>X</b>	Additional Account Owner Signature (if applicable) <b>X</b>

### Account 4

Account Number	Check all that apply: <input type="checkbox"/> SelectLink <input type="checkbox"/> Combined mail <input type="checkbox"/> Interested party	
Primary Account Owner Signature <b>X</b>	Joint Account Owner Signature (if applicable) <b>X</b>	Additional Account Owner Signature (if applicable) <b>X</b>



**Account 5**

Account Number	Check all that apply: <input type="checkbox"/> SelectLink <input type="checkbox"/> Combined mail <input type="checkbox"/> Interested party	
Primary Account Owner Signature <b>X</b>	Joint Account Owner Signature (if applicable) <b>X</b>	Additional Account Owner Signature (if applicable) <b>X</b>

**Account 6**

Account Number	Check all that apply: <input type="checkbox"/> SelectLink <input type="checkbox"/> Combined mail <input type="checkbox"/> Interested party	
Primary Account Owner Signature <b>X</b>	Joint Account Owner Signature (if applicable) <b>X</b>	Additional Account Owner Signature (if applicable) <b>X</b>

**Account 7**

Account Number	Check all that apply: <input type="checkbox"/> SelectLink <input type="checkbox"/> Combined mail <input type="checkbox"/> Interested party	
Primary Account Owner Signature <b>X</b>	Joint Account Owner Signature (if applicable) <b>X</b>	Additional Account Owner Signature (if applicable) <b>X</b>

**Account 8**

Account Number	Check all that apply: <input type="checkbox"/> SelectLink <input type="checkbox"/> Combined mail <input type="checkbox"/> Interested party	
Primary Account Owner Signature <b>X</b>	Joint Account Owner Signature (if applicable) <b>X</b>	Additional Account Owner Signature (if applicable) <b>X</b>

**Account 9**

Account Number	Check all that apply: <input type="checkbox"/> SelectLink <input type="checkbox"/> Combined mail <input type="checkbox"/> Interested party	
Primary Account Owner Signature <b>X</b>	Joint Account Owner Signature (if applicable) <b>X</b>	Additional Account Owner Signature (if applicable) <b>X</b>

**Account 10**

Account Number	Check all that apply: <input type="checkbox"/> SelectLink <input type="checkbox"/> Combined mail <input type="checkbox"/> Interested party	
Primary Account Owner Signature <b>X</b>	Joint Account Owner Signature (if applicable) <b>X</b>	Additional Account Owner Signature (if applicable) <b>X</b>

**Please note that all account owner signatures are required.**

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

**FOR BROKER-DEALER USE ONLY**

Correspondent Number	Group Name
Processed by (print name)	Date
Processed by (signature) <b>X</b>	