

Please Print or Type

This form should be used to establish and modify Systematic Purchases for contributions via the Automated Clearing House (ACH) Network.

Forward To: First Trust Ret	irement, c/o SS&C
<u>Regular Mail</u>	Overn
PO Box 219445	Mail S
Kansas City, MO 64121-944	5 430 V
855-387-3847	Kansa

<u>Overniqht Delivery</u> Mail Stop: Bluerock 430 West 7th Street Kansas City, MO 64105-1407

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Step	1.	IKA	OWNER	INFURN	ΙΔΠΟΝ

Address City / State / Zip Phone Number Stop 2:SYTEMATIC PURCHASE INSTRUCTIONS Modify Existing Systematic Purchase Plan Delete Existing Systematic Purchase Plan Stop 2:ASYTEMATIC PURCHASE INSTRUCTIONS Modify Existing Systematic Purchase Plan Delete Existing Systematic Purchase Plan Stop 2:AIA CONTRRUCTION INFORMATION Modify Existing Systematic Purchase Plan Delete Existing Systematic Purchase Plan Stop 2:AIA CONTRRUCTION INFORMATION Year* Employer Contribution Year* "Prior war contributions can only be releted for the months of January – March; April – December contributions will reflect as current year. Start Month Frequency Contribution Date(s) Start Month Frequency Contribution Date(s) Namunt Start Month Frequency Contribution Date(s) Butrack to ful Income + Real Estate* \$	IRA Owner Name	Social Security Number	Account Number				
	Address	City / State / Zip	Phone Number				
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Frequency – Monthly (Jan, Feb, Yan, etc.), Quarterly (Mar, Jun, Sep), Dec), Seni – Annually (Jan, Dec), Annual percentage vield may change at any time. Interest will be compounded and credited on the last day of each calendar month. The daily balance method is used to aclulate the interest on cash in the account. The bank deposit is insured up to applicable PDIC limits. Step 5: BAUK ACCOUNT INFORMATION (Required if setting up news Systematic Purchass or modifying existing bank instructions) Account Type: Checking (Voided Check Required) Savings (Letter on Bank Letterhead Required) Bank Account Registration (Include all registration names) Only one bank account may be on file. Signature of bank account may be on file. Signature of bank account may be on file. Signature of bank account one must be same as its Malore. Senter and account any be on file. Signature of bank account may be an file. Signature of bank account may be on file. Signature of bank account may be an file.	Undirected Cash**	\$] M □ Q □ SA □ A				
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 I have had the opportunity to review this transaction with tax, legal, financial and/or other advisors of my choice and am satisfied that I meet all suitability requirements imposed by the investment entity and the investment is suitable for the IRA account; I understand that if the assets are not publicly traded, redemptions may be limited and I have considered these factors along with other IRA requirements, such as required minimum distributions, when determining the suitability of this investment for my IRA account; I understand that First Trust Retirement does not make any determination with respect to suitability nor does it have a duty to conduct any suitability analysis on my behalf; I acknowledge that It is my sole responsibility, to direct the investment of my account and that First Trust Retirement as a subcodian, will not have responsibility. Giscretion, or involvement in evaluating or selecting any assets or investments, and shall have no liability for any loss, damage, and/or tax (including a prohibited transaction tax) that may result from or be associated with the transaction requested herein; I certify that no tax advice has been given to me by First Trust Retirement and that all decisions regarding these Additional Investment Instructions are my own; I agree to indemnify and hold First Trust Retirement harmless from and against any and all claims, liabilities; cuses of action, losses and expenses (including, without limitation to, any court costs, attorney's fees and other expenses) asserted against or incurred by First Trust Retirement as a result of, or in any way relating to, any actions requested or directed by me or by my authorized representative, whether in these Additional Investment Instructions or otherwise; I agree that First Trust Retirement may condition any action or any further action it may agree to undertake, upon its receipt from me, in form satisfactory to it, of written instruction to							
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