

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 |
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| 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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| Traditional IRA | | Modify Existing Systematic Purchase Plan | Delete Existing Systematic Purchase Plan | | | | |
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| Step 4: INVESTIGNENT INSTRUCTIONS I direct First Trust Retirement, Custodian, to set up my Systematic Purchase Plan as follows: Investment Option Amount Start Month Frequency Contribution Date(s) Bluerock Total Income + Real Estate* \$ Image: Contribution Date Systematic Purchase Plan as follows: Image: Contribution Date Systematic Purchase Plan as follows: Indirected Cash** \$ Image: Contribution Date Systematic Purchase Plan as follows: Image: Contribution Date Systematic Purchase Plan as follows: Indirect First Trust Retirement, Castodian, to set up my Systematic Purchase Plan as follows: Image: Contribution Date Systematic Purchase Plan as follows: Image: Contribution Date Systematic Purchase Plan as following Date Systematic Purchase Plan as Plan Plan By Date Systematic Purchase Plan By Date Systematic Pu | | | | | | | |
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| Bluerock Total Income + Real Estate* \$ | | | | | | | |
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| Undirected Cash** spectral podd: sponsor program will be grin (Must be at least one month past date form is delivered) Frequency – Monthly (Mar, <i>Hen, Nar, Etc.). Quarterly (Mar, Inn., Sept. Dec). Semi-Annually (Mar, Dec), Annually (Mar, Dec), Annual processes of the following and Marken State (Mar, Marken State), Annual Annual Proceeding on the Interest will be deposited in an interest beaing Account (Marcreed Cash). The bank deposite inserts and annual proceeding on the isot system of the interest on cash in the account. The bank deposite inserts and parkenest of the Interest will be deposited in an interest beaing Account (Marcreed Cash). The bank deposite insert deposited in an interest beaing Account Number (Marced Cash). Bank Account Number Bank Account Registration (Include all registration name) • Annual Starter checks are not acceptable. • Undorde the abs deposed in an interest beaing Account Number (9-digits) Bank Account Number Bank Account Registration (Include all registration name) • Annual Starter checks are not acceptable. • Undorde theck is not available, a letter on bank letterhead signed by a branch manager outling all above information. State OWNER AEEIIMATION • Checking (Voided Check Hequired) • Undorde theck is not</i> | Bluerock Total Income + Real Estate* | | · · · · · · · · · · · · · · · · · · · | | | | |
| 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 | | | | |
| Contribution Date(s)select a date between 1-28. (ff 29. 30, or 31 are chosen, 28 will be used.) Any purchases that or curvo ver a weekend or non-business day will be processed the following busines day. (ff Contribution Date(s) is not provided, it will default to the 15 th of despirated frequeron. **Gese contact product sponsor for potential product sponsor specific requirements or minimum. All systematic investments will follow the admittance guidelines outlined in the prospective of the investment. **Undicted Cash Manimum 525.00. Any undirected data Manimum 520.00. Any undirected data Manimum 520.00. Any undirected data Manimum 520.00. Any undirected data Manimum 500.00. Any undirected data Manimum 520.00. Any undirected data Manimum | , | | | | | | |
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| IRA account. By signing this form, I acknowledge that the IRA account is self-directed and that I am solely responsible for the investment outcomes within the account, and further acknowledge the following: 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 if its Trust Retirement does not make any determination with respect to suitability or does it have a duty to conduct any suitability analysis on my behlf; I acknowledge that it is my sole responsibility to direct the investment of my account and that First Trust Retirement, acting as Custodian, will not have responsibility discretion, or involvement in evaluating or selecting any assets or investments, and shall have no lability for any loss, damage, and/or tax (including acus), alout and industributions are my own; I agree to indemnify and hold first Trust Retirement harmless from and against any and all claims, liabilities, causes 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 shall have no obligation, other than maintaining custody of the assets, to take any action with respect to the assets acquired for this IRA account pursuant to these Additional Investment Instruc | I direct First Trust Retirement (the "Custodian"), trade na | ne of Mainstar Trust, to execute, as Custodian, the purchas | e of the above-named asset for the benefit of my self-directed | | | | |
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IRA Owner Signature