

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 Retirement,	c/o SS&C
<u>Regular Mail</u>	<u>Overr</u>
PO Box 219422	Mail S
Kansas City, MO 64121- 9422	430 V
855-387-3847	Kansa

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

Step 1: IRA OWNER INFORMATION

IRA Owner Name Social Security Number Account Number Address City / State / Zip Phone Number Stop 20 SYSTEMATIC PURCHASE INSTRUCTIONS Stop 20 SYSTEMATIC PURCHASE INSTRUCTIONS Phone Number Stop 20 SYSTEMATIC PURCHASE INSTRUCTIONS Modify Existing Systematic Purchase Plan Delete Existing Systematic Purchase Plan Stop 20 SYSTEMATIC PURCHASE INSTRUCTIONS Figure 20 Systematic Purchase Plan Delete Existing Systematic Purchase Plan Traditional IRA Roth IRA SEP IRA Employee Contribution (Section Preve*) "Prior year contributions can only be selected for the months of Jonuary - March: April - December contributions will refect as current year. Sep Always State Always Statematic Purchase Plan as follows: Interestiment Option Amount State Month M Clo SA & A A Undirected Cash** S State Month M Clo SA & A A State Month - Month in which Systematic Purchase Plan as follows: M Clo SA & A A A "Head on the month in which Systematic Purchase Plan as follows: M Clo SA & A & A A A "Head on the month in which Systematic Purchase Plan as follows: M Clo SA & A & A A A "Head on thead month in which Systematic Purchase Plan as follows:	IDA Ourses Newses Association Association Association	
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 Step 6: IRA OWNER AFFIRMATION I direct First Trust Retirement (the "Custodian"), trade name of Mainstar Trust, to execute, as Custodian, the purchase of the above-named asset for the benefit of my self-directed 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 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 inrect 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 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 has 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		
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 I understand that the purchase of assets described above or any action requested or directed by me (whether in these Additional Investment Instructions or otherwise) is subject to all terms and conditions of the Account Agreement as amended from time to time. 	 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 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 Investignations 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 Investignations or otherwise; I understand 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 undertake such action, together with such further agreement or undertaking of indemnification as First Trust Retirement may reasonably request; and 	tment ment

Step 7: SIGNATURE REQUIRED

I hereby acknowledge that this agreement is between the IRA Owner named in Step 1 and the Custodian and that Product and its affiliates (i) shall have no obligations or liability under this agreement or for any transactions executed in connection herewith; (ii) shall have no responsibility, discretion or involvement in evaluating or selecting assets or investments; and (iii) shall not be deemed to be a "fiduciary" as defined in the Employee Retirement Income Security Act of 1974, as amended, and/or Section 4975 of the Internal Revenue Code of 1986, as amended, with respect to any assets or property of the IRA account.

IRA Owner Signature

Date