

# Amundi US

## Letter of Instruction

### Shareholder Medallion Signature Guarantee/Signature Validation Program Stamp Request

Signatures of all registered account owners are required. A Medallion Signature Guarantee is required for certain financial transactions. A Signature Validation Program Stamp is required for certain non-financial or account maintenance requests. See Section 5 for more information.

**Additional documents may be required. If you are requesting a transfer of non-retirement assets, you must complete an Amundi US Transfer Form.**

**If you have any questions, call us at 1-800-225-6292.**

**Mail completed form to Amundi US, PO Box 534427, Pittsburgh PA 15253-4427.**

**Overnight Address: Amundi US, Attention 534427, 500 Ross Street, 154-0520, Pittsburgh, PA 15262**

### 1 Current Account Information

Name on Account(s) (First, Middle Initial, Last)

Date of Birth (Month/Day/Year)

Name on Account(s) (First, Middle Initial, Last)

Date of Birth (Month/Day/Year)

Account Number(s)

Social Security / Tax ID Number

Address

City

State

Zip Code

Telephone Number

### 2 Additional Information

**1. If you are not the account owner(s), but are acting on behalf of the account owner(s), indicate your capacity here and sign with your legal capacity in Section 4:**

**Guardian**

**Attorney-in-Fact**

**Custodian for Minor**

**Other (List specific capacity)** \_\_\_\_\_

Requestor's Name(s)

Requestor's Street Address

City

State

Zip Code

Telephone Number



#### 4 Signatures - Please sign below and indicate your legal capacity (if applicable)

Requestor	Legal Capacity
Attorney-in-Fact	Attorney in fact signs and states capacity (example: Pat Miller, Attorney-in-Fact)
Custodian	Custodian signs and states capacity (example: Pat Miller, Custodian)
Legal Guardian	Legal Guardian signs and states capacity (example: Pat Miller, Guardian)
Trustee	Trustee(s) signs and states capacity (example: Pat Miller, Trustee)
Other Fiduciary(ies)	Fiduciary(ies) signs and states capacity (example: Pat Miller, Executor or Pat Miller, Personal Representative)
Corporation or other organization	An authorized officer signs and states capacity (example: Pat Miller, President)

If I/we are beneficiaries of the above mentioned account, I/we will be responsible for any inheritance tax assessed against the account if a redemption of assets is requested. I recognize that the Pioneer Funds, their distribution, transfer agent, or affiliated companies, or their directors, trustees, or employees (collectively "Amundi US") will not be liable for any loss, damage, or expense as a result of acting upon my instruction; and certify that no tax advice has been given to me/us by Amundi US.

All registered owners must sign as their name appears on the account registration. All authorized signers must sign in capacity. If applicable, please provide a Medallion Signature Guarantee or Signature Validation Program Stamp in the box below. For more information, see Section 5. Note: Minors are not authorized to sign.

<b>X</b> Signature of Account Owner (or Requestor, if applicable)	Legal Capacity (i.e. Executor, Trustee, Custodian)	Date (Month/Day/Year)
<b>X</b> Signature of Joint Account Owner (or Requestor, if applicable)	Legal Capacity (i.e. Executor, Trustee, Custodian)	Date (Month/Day/Year)

**Use this space for the Medallion Signature Guarantee or Signature Validation Program Stamp.**

#### 5 Instructions to Obtain a Medallion Signature Guarantee / Signature Validation Program Stamp

##### What is It?

Medallion Signature Guarantees and Signature Validation Program Stamps are used across the investment industry to protect shareholder accounts from unauthorized transactions. An officer of a financial institution reviews the proper legal documents pertaining to your request, witnesses your signature, and guarantees that your signature is genuine by stamping the form or letter and signing his or her name and title.

An original STAMP2000 Medallion Signature Guarantee and Signature Validation Program Stamp use bar codes and special ink and has other security features to deter counterfeiting. For this reason, only originals will be accepted.

**Note:** A notary's seal cannot serve as an alternative to a Medallion Signature Guarantee and/or Signature Validation Program Stamp.

##### When is it Required?

For your protection, Amundi US requires a Medallion Signature Guarantee on certain transaction requests and a Signature Validation Program Stamp on certain maintenance and non-financial requests. When an institution provides a stamp, it assures us that the signature and instructions are genuinely yours and that you have the authority to provide the instruction(s) contained within the request.

**You must provide a Medallion Signature Guarantee Stamp when you request any of the following:**

##### Redemptions:

- Requests over \$100,000
- Requests made payable to someone other than the registered shareholder(s)
- Requests made payable to the registered shareholder(s) at an address different from the one on the account (including bank instructions)
- Add or change a systematic withdrawal plan directing funds be deposited into new bank information

## When is it Required? (continued)

### Transfers:

- Requests to transfer retirement plan assets over \$100,000 to a new custodian
- Requests to transfer shares to an account with a different registration (i.e. beneficiary request, gift shares)

### Other:

- Financial requests in which the address of record has been changed in the past thirty (30) days
- Directing dividends and/or capital gains be deposited into new bank information
- Exchanges over \$500,000

**There may be other unique situations that require a Medallion Signature Guarantee Stamp.**

**You must provide a Medallion Signature Validation Program Stamp when you request any of the following:**

- Add or change a systematic withdrawal plan directing funds be sent via check
- Add telephone or online purchase or redeem options
- Add or change bank information to an account

**There may be other unique situations that require a Signature Validation Program Stamp.**

## Who Can Provide It?

**Institutions that may be able to provide a Medallion Signature Guarantee Stamp and/or Signature Validation Program Stamp:**

- Domestic banks
- Credit Unions
- Trust companies
- National securities exchanges
- Savings associations (including Savings and Loan associations)
- Government securities broker/dealers whose net capital exceeds \$100,000
- Broker/dealers
- Clearing agencies
- Municipal securities broker/dealers
- Registered securities associations

The institution from which you obtain a Medallion Signature Guarantee Stamp and/or Signature Validation Program Stamp will require certain legal documentation to verify your identity, legal authority, and capacity. Contact the financial institution where you intend to obtain the stamp to learn what specific documents you will need in order to obtain the Medallion Signature Guarantee and/or Signature Validation Program Stamp.

Medallion Signature Guarantees must cover the amount of the requested transaction. There are several different guarantee amounts, so it is important to acquire a guarantee amount equal to or greater than the amount of the transaction(s). There is a unique identification number with a letter prefix on each Medallion signifying the dollar amount covered by the guarantor. The amount of coverage associated with each corresponding prefix is as follows:

A \$1,000,000  
B \$750,000  
C \$500,000  
D \$250,000  
E \$100,000  
F (Credit Unions) \$100,000 (per transaction) X \$2,000,000  
Y \$5,000,000  
Z \$10,000,000

**If the surety bond of the Medallion Signature Guarantee Stamp is less than the transaction(s) amount, your request will be rejected.**

**Please Note:** If your instructions contain a financial request as well as a non-financial or maintenance request, Amundi US will require a Medallion Signature Guarantee in order to process the entire request.

A Notary Stamp for all registered owners may be acceptable for the following Non-Financial or Maintenance requests:

- Name Change Request for Current Shareholder

Additional requirements may apply. Please contact Amundi US for more information.