

TRANSFER NON-QUALIFIED TO NON-QUALIFIED ACCOUNT

To Whom It May Concern:

Thank you for your inquiry regarding information related to a transfer of assets from your existing Primerica Shareholder Services non-retirement account; and using the assets to fund an existing or establish a new account.

In response to your request, we have included information regarding your request to transfer assets. Please read this letter carefully and the instructions provided. You may not use these instructions or the attached form to transfer assets in an account due to death of an account owner, divorce or other events.

The attached form or a Letter of Instructions will be required by the Transfer Agent to process your transfer request. If you are using a letter of instructions, you must provide all the information stated on the attached form and provide specific instructions for your request.

An original signature guarantee may be required to process your transfer request and may be obtained from an officer of most financial institutions. A medallion signature guarantee is preferable. If the signature guarantee is NOT medallion, you will be required to provide the name and phone number of the person providing the signature guarantee for verification purposes. Please note that a notary public cannot provide a signature guarantee. A signature guarantee is a warranty by the grantor that the signature is genuine, and that the person(s) signing is competent and authorized to sign.

If you have questions, need additional information, or need assistance locating a Representative, please contact our Customer Service Department at 1-800-544-5445. Customer Service Representatives are available to assist you, Monday through Friday between 8 a.m. and 8 p.m. ET.

PRIMERICA SHAREHOLDER SERVICES TRANSFER FORM FOR NON-QUALIFIED TO NON-QUALIFIED ACCOUNT (INST)

You may use this form to transfer assets from your non-qualified account with Primerica Shareholder Services (PSS) to another non-qualified account or another type of non-qualified account. If the transfer is not within the same fund family, a Disclosure and Authorization Form (PFSI-DA) may be required. **If you do not have an existing PSS account with the registration you are requesting, you must contact your PFS Representative to complete the appropriate New Account Application and the Customer Identification Form for the account type and registration you wish to establish.**

Please mail this completed form and, if required, the appropriate New Account Application to:

**Primerica Shareholder Services
P.O. Box 534485
Pittsburgh, PA 15253 – 4485**

You must provide your non-qualified account number from which assets are to be transferred.

Section 1:

Please indicate which funds you would like transferred from your existing non-qualified account to your new or existing non-qualified account. If this is not full transfer, indicate the fund position(s) from which we are to transfer and a specific share or dollar amount to be transferred into the requested account. **If you need additional space, please submit an additional sheet with the information provided.**

Section 2:

You must complete this section if your assets are being transferred to an existing non-qualified account with PSS with the desired registration (otherwise a New Account Application is required and you must provide the information on that application). Please indicate how we are to invest the proceeds transferred from your non-qualified account to your existing non-qualified account. Please indicate the fund position(s) into which we are to invest and a specific share or dollar to be invested.

NOTE: Investments will be moved “in kind” to your existing account, that is the same fund(s) currently held in the account will be moved to your existing account. You should speak with your PFSI Agent for assistance in determining what if any changes should be made after the transfer to your name is complete.

Section 3:

To transfer the assets from your non-qualified account to fund an account with a different registration or remove / add additional owners, all registered account owners must sign the Transfer Form for Non-Qualified to Non-Qualified Account. **You will be required to provide a signature guarantee if:**

Individual or Joint Account Transfer to Trust with owner(s) as only trustee(s) (Trust New Account Application SB-50 TR)	No
Individual or Joint Account Transfer to trust with where current owner(s) are not the only trustees (Trust New Account Application SB-50 TR)	Yes
Joint Account request to remove Joint Owner	Yes – From each owner who will not be a registered owner of shares upon transfer.
Individual or Joint Account add new owner	No
Individual or Joint Account transfer to a UGMA/UTMA (SB-52) or another account type offered by PFS Investments Inc., (Business SB-50 BUS, SB-50 NPO)	Yes from each owner

PRIMERICA SHAREHOLDER SERVICES

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You must provide the PSS account number from which the assets will be transferred. The account number is required to process your request.

Account Number:

1. Please indicate the number of shares / dollars you wish to transfer and fund position(s).

- Transfer all shares in all fund positions Transfer # of shares from the fund number(s) provided
- Transfer the dollar amount stated from the fund number(s) provided

FROM ACCOUNT: (Listed above)

	Fund Number / NASDAQ Symbol	# of Shares	\$ Dollar Amount
Fund 1	<input style="width: 40px; height: 20px;" type="text"/>	# <input style="width: 100px; height: 20px;" type="text"/>	\$ <input style="width: 100px; height: 20px;" type="text"/>
Fund 2	<input style="width: 40px; height: 20px;" type="text"/>	# <input style="width: 100px; height: 20px;" type="text"/>	\$ <input style="width: 100px; height: 20px;" type="text"/>
Fund 3	<input style="width: 40px; height: 20px;" type="text"/>	# <input style="width: 100px; height: 20px;" type="text"/>	\$ <input style="width: 100px; height: 20px;" type="text"/>

2. Please indicate if you have an existing account with the requested registration or if this will be a new PSS account. If the assets are being transferred to an existing account, you must complete Section 4.

- Existing Account:**
- New Account** (New Account Application Required)

NOTE: Investments will be moved “in kind” to your existing account, that is the same fund(s) currently held in the account will be moved to your existing account. You should speak with your PFSI Agent for assistance in determining what if any changes should be made after the transfer to your name is complete

3. TO ACCOUNT: Please indicate the number of shares / dollars to transfer and the fund position(s).

	Fund Number / NASDAQ Symbol	# of Shares	\$ Dollar Amount
Fund 1	<input style="width: 40px; height: 20px;" type="text"/>	# <input style="width: 100px; height: 20px;" type="text"/>	\$ <input style="width: 100px; height: 20px;" type="text"/>
Fund 2	<input style="width: 40px; height: 20px;" type="text"/>	# <input style="width: 100px; height: 20px;" type="text"/>	\$ <input style="width: 100px; height: 20px;" type="text"/>
Fund 3	<input style="width: 40px; height: 20px;" type="text"/>	# <input style="width: 100px; height: 20px;" type="text"/>	\$ <input style="width: 100px; height: 20px;" type="text"/>

4. Owner's Signature

Owner's Signature: _____ Date _____

Joint Owner's Signature: _____ Date _____

Signature Guarantee Stamp

Signature Guarantee Stamp

Guarantor Name: _____

Guarantor Phone No.: _____

SIGNATURE GUARANTEE STAMP: I / We guarantee the signature(s) of the applicants(s) and to the best of my knowledge and belief the applicant is of full age and legally competent. A separate signature guarantee stamp must be affixed to this form for each signor.