

Secondary Contact Information Form

INSTRUCTIONS:

1. Complete the attached Secondary Contact Information Form
2. Sign the form
3. Mail the completed, signed form to:

Please send to: Regular Mail

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

Overnight Mail

Primerica Shareholder Services
Attention: 534485
500 Ross Street, 154-0520
Pittsburgh, PA 15262

Client Services: (800) 544-5445

This form is used to establish a secondary contact on an existing account. If we are unable to reach you or if we have a reasonable concern about your well-being, you authorize us to contact the person(s) below to confirm your current contact information, your health or mental status, and/ or the identity of a legal fiduciary.

This form DOES NOT allow the person(s) named below to execute transactions within the account.

1. Please provide the fund family, account number, and the names of the account owner(s) as they appear on your account statement.
2. Enter the name, relationship, and phone number of your secondary contact(s).
3. Please provide the name of your Primerica Representative.
4. Sign and date the form. For joint accounts, all account owners must sign this form.

NOTE: This form is not valid for Trust accounts, Corporate / Business accounts, or other accounts owned by financial entities.

PLEASE PRINT INFORMATION CLEARLY

Fund Family: _____ Account Number: _____

Primary Account Owner Name: _____

Account Joint Owner Name: _____

PRIMARY CONTACT

First Name: _____ Last Name: _____

Relationship to Account Owner: _____

Full Address: (street address, city, state, & zip) _____ Address is the same as account owner.

Contact Number: _____ Email Address: _____

SECONDARY CONTACT

First Name: _____ Last Name: _____

Relationship to Account Owner: _____

Full Address: (street address, city, state, & zip) _____ Address is the same as account owner.

Contact Number: _____ Email Address: _____

PFS INVESTMENTS INC. REGISTERED REPRESENTATIVE INFORMATION

Representative Name (print name): _____

ACCOUNT OWNER'S SIGNATURE

Account Owner's Signature: _____

Account Joint Owner's Signature: _____