How to Restart your Pre-Authorized Checking (PAC) Plan

If you need to provide new bank account information to restart your PAC please complete and submit the <u>Start/Change</u> <u>Bank Draft Options Form</u> and send it along with a voided check or the <u>Provide Bank Information form</u>. Your new bank account will be added and your PAC restarted.

If you had an active PAC that you have stopped and would like to restart purchases using the <u>same</u> bank account, you may do so right on <u>Shareholder Account Manager (SAM)</u>.

Once you have logged in:

Go to the '**Trade**' tab and choose '**Automatic Buys'.** A list of all PAC plans on the account will come up.

Stopped PACS will show '**INACTIVE**' in red next to '**Status**',

To restart an inactive PAC click on 'Edit' to the far right.



The Modify Plan screen will display:

Modify Plan

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NOTE: We are unable to stop a draft in process. To avoid returned item late fees you should submit your request at least 3 business days in advance.

Please make any desired changes and when complete click the Update button for final review and confirmation. *Position:* SBLGX - ClearBridge Large Cap Growth Class A

Purchase Amount:

Edit Pre-Authorized Check Plan

Dollar amount you'd like to purchase every period. Minimum purchase amount is \$50.00.

You may restart the PAC by scrolling down to the section Marked '**Stop Date**': Click on the drop down menu, scroll to the bottom, select '**Remove Stop Date**'



Scroll down to the bottom of page and Click the box Update Plan to save your changes. The Modify Plan page also offers many other options: you may change the amount of each purchase, the day of the month that purchases occur on, which months that purchase will occur, provided you have more than one bank account on file, you may switch the bank account being used for purchases and/or add an '**Automatic Increase**' to your PAC so you can plan for the future and have your PAC update by the amount you choose, when you choose without having to log back in.

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We hope you find this information useful and look forward to meeting all you investment needs.