

# Add / Change Bank Information or PAC Option Form

## INSTRUCTIONS:

1. Complete the attached Add / Change Bank Information or PAC Option Form.
2. Sign the form
3. Mail or fax the completed, signed form to:

Please send to: Regular Mail

Overnight Mail

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

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

Client Services: (800) 544-5445

Fax Services: (833) 748-4712 (acceptable only if a notary is not required)

You may use this form to provide banking information, establish pay access, add a new PAC option, change a current PAC draft, and add or change an automatic PAC increase (optional) on your account.

**IMPORTANT:** This form cannot be faxed to PSS if a notary is required. See the instructions below on when a notary is required.

## REQUIRED INFORMATION SECTION

You must include the account owner's name, account number, social security number, date of birth, and telephone number in order for PSS to process your request.

### SECTION 1 – BANKING INFORMATION

**IMPORTANT:** Completing this section requires this form (POL-C06) to be notarized.

**NOTE:** If new banking information is provided, existing pay access will become inactive and replaced with the new bank pay access.

**NOTE:** The use of new bank information is restricted for 30 days on withdraw request.

- Select type of bank account (checking or savings)
- Complete current bank account information if you have an existing pay access on record. (See note above)
- Complete new bank account information or attach a pre-printed void check (deposit/withdraw slip for savings account).
- All PACs stopped within the past 6 months will automatically restart. If you do not wish to restart recently stopped PACs, indicate that in section 1 by checking the appropriate box.

### SECTION 2 – ADD NEW PAC DRAFT OPTION

**IMPORTANT:** Federal / Bank regulations allow only 6 ACH transactions per month to / from savings accounts.

**NOTE:** The minimum draft amount is \$25 per fund position (Legg Mason funds have a \$50 minimum.)

- Specify the fund number, draft dollar amount, PAC start date, and the draft day(s)

### SECTION 3 – CHANGES TO CURRENT PAC DRAFT

**IMPORTANT:** Federal / Bank regulations allow only 6 ACH transactions per month to / from savings accounts.

**NOTE:** The minimum draft amount is \$25 per fund position (Legg Mason funds have a \$50 minimum.)

- Changes will be effective on the PAC start date you provided
- Specify the fund number, draft dollar amount, PAC start date, and the draft day(s)

### SECTION 4 – ADD OR CHANGE AUTOMATIC PAC INCREASE OPTION

- This feature is optional to shareholders
- Selection Increase existing bank draft or Increase new bank draft
- Choose a frequency
- Specify the fund number, begin date, dollar amount or percentage to be increased.

### SECTION 5 – SIGNATURES

**NOTE:** Notary seal is only required for Section 1

- All account owners must acknowledge, sign and date the form

(This page retained by the Client)

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