

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 [Start/Change Bank Draft Options Form](#) and send it along with a voided check or the [Provide Bank Information form](#). Your new bank account will be added and your PAC restarted.

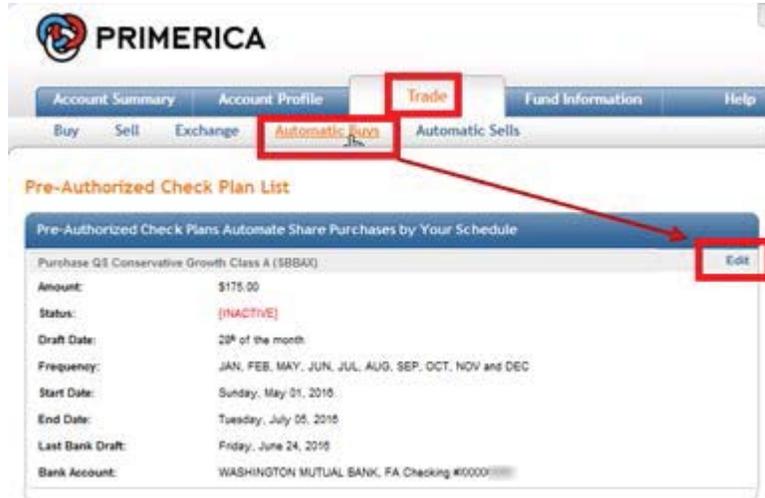
If you had an active PAC that you have stopped and would like to restart purchases using the same bank account, you may do so right on [Shareholder Account Manager \(SAM\)](#).

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



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.

Edit Pre-Authorized Check Plan

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:

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.

Edit Pre-Authorized Check Plan

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:
Dollar amount you'd like to purchase every period. Minimum purchase amount is \$50.00.
NOTE: To avoid contributing an excess amount to your retirement account, confirm IRS limitations on annual contributions prior to making a change.
\$ 50.00

Draft Date:
Day of the month to buy shares.
22nd of the month

Months to Purchase Shares:
Which months to buy shares. Valid values are: YES - buy shares on the Draft Date of this month, NO - don't buy shares this month, and SKIP ONCE which means don't buy on the Draft Date of this month and then automatically switch to YES once passed.

JAN:	YES	FEB:	YES	MAR:	YES
APR:	YES	MAY:	YES	JUN:	YES
JUL:	YES	AUG:	YES	SEP:	YES
OCT:	YES	NOV:	YES	DEC:	YES

Direct Debit Bank Account:
Select a linked bank account to finance automatic purchases made on your behalf. Note that your bank account will typically be debitted prior to the Draft Day so that funds are available to execute your trade as requested.
WASHINGTON MUTUAL BANK, FA Checking#XXXXX

Automatic Increase Program:
Optional program to automatically increase your purchase amount on a pre-defined schedule. To use, define either the dollar amount or the percentage you'd like to increase your purchases by and then define how often and when to begin your program. To stop an auto-increase program, set both the dollar and percentage amounts to 0 and the frequency and increase date to Inactive.

Automatic Increase Amount
\$ 0.00

Automatic Increase Percentage
0.00 %

Automatic Increase Frequency
(Inactive)

Automatic Increase Next Process Date
JAN 2018

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