



# Thesis Funds Account Privileges Change Form

**Overnight Delivery:**  
Thesis Funds  
803 W. Michigan St.  
Milwaukee, WI 53233-2301

**Regular Mail:**  
Thesis Funds  
P.O. Box 2175  
Milwaukee, WI 53201-2175

### 1. CURRENT ACCOUNT INFORMATION

Changes will apply to the following accounts:

\_\_\_\_\_  
Fund Account Number

\_\_\_\_\_  
Fund Account Number

\_\_\_\_\_  
Fund Account Number

\_\_\_\_\_  
Fund Account Number

\_\_\_\_\_  
SSN or TIN

\_\_\_\_\_  
Name(s) on Account

### 2. BANK INFORMATION

**This form must be received at least 14 days prior to your initial transaction to establish and confirm your bank information. You must attach a blank, voided check from your bank account to this form. If you are adding or changing bank information after your account has been established, a Medallion signature guarantee is required.**

I would like to:  Add  Change Bank Information

\_\_\_\_\_  
Bank Name

\_\_\_\_\_  
Bank Address

\_\_\_\_\_  
ABA Routing Number Account Number

\_\_\_\_\_  
Name(s) on Bank Account

#### Account Type

Checking Account  Savings Account

I authorize the bank listed above for:

Electronic Funds Transfer (takes 2 – 3 business days)

Wire (\$15 Fee – takes 1 business day)

### 3. TELEPHONE OPTIONS

**A Medallion signature guarantee is required to add telephone exchange or redemption privileges.**

Add  Delete

**Telephone Redemption.** Permits the redemption of a minimum of \$500 and a maximum of \$50,000. A minimum of \$500 must remain in your account to keep it open.

### 4. AUTOMATIC INVESTMENT PLAN

If you are adding or changing your bank information, please complete Section 2. Minimum additions to the Fund for auto investments are \$100. Automatic investments can be made on the 5th and/or 20th of each month.

I would like to:

Add  Change Automatic Investment Plan  
 Monthly  Quarterly (Jan., Apr., July, Oct./Feb., May, Aug., Nov./Mar., June, Sept., Dec.)

\_\_\_\_\_  
Begin investment on mm/yy

5th  20th \$ \_\_\_\_\_  
Fund Amount

5th  20th \$ \_\_\_\_\_  
Fund Amount

5th  20th \$ \_\_\_\_\_  
Fund Amount

Your automatic investment will be withdrawn directly from your checking or savings account named in Section 2 on the date you have selected or the first business day thereafter. You will be assessed a \$25 fee if the automatic investment cannot be made for any reason. If no date is selected, purchases will be made on the 20th of each month.

