S·e·l·e·c·t Link®

A Complete Financial Picture

Consolidate Your Household Accounts

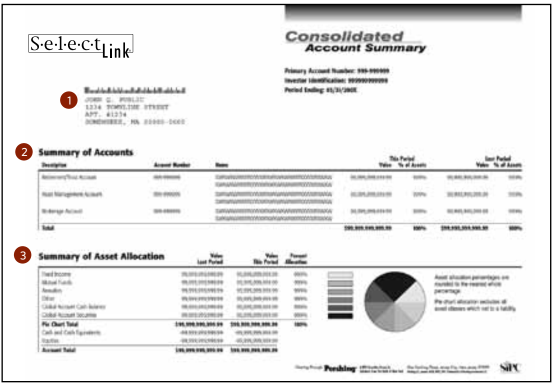
Many investors have multiple accounts in their households. For instance, you may have a brokerage account for each member of your family, individual retirement accounts for yourself and for your spouse, and an asset management account to handle your investment, check writing and debit card needs. Managing all of your accounts can be complicated and time consuming, but SelectLink® can help you get organized and keep track of your multiple household accounts. With this complimentary service, you can link all of your accounts that share the same mailing address.[1] As a result, SelectLink consolidates all of your household statements, prepares a summary cover page, and mails these documents to you in one package.

View Your Complete Financial Picture

In a single glance, you can obtain the status of your household finances. You no longer need to calculate your aggregate portfolio value by adding the totals for all of your household accounts—the SelectLink summary organizes this information for you. The SelectLink summary enables you to view the net worth of each account, as well as the combined net worth for all of your household accounts. In addition, the SelectLink summary provides the values and percentages of each asset category in your portfolio (for instance, stocks, bonds, and mutual funds).

A Comprehensive Summary

The SelectLink summary page is very easy to read:



1 The Mailing Address indicates the name and address of the primary account owner to which all statements will be sent.

2. The Summary of Accounts section lists each of the linked accounts, including the account description, the account number, and the registration of each account. This section also provides the value of each account, the percentage of total assets for each account, and the entire market value (or net worth) of all accounts included in the SelectLink summary.

3. The Summary of Asset Allocation section summarizes the value of each type of investment held in your linked accounts, along with the percentage that each asset category represents.

Additional Statement Mailing Alternatives

> **Combined Mail.** If you would like to have multiple account statements in your household included in the same envelope, but not summarized in the SelectLink summary, you can enroll in our Combined Mail service by completing the attached application and selecting the "Combined Mail" option.

> **Interested Parties.** If you would like to receive Interested Party statements for accounts held outside of your residence within your SelectLink and/or Combined Mail package, you can enroll in our Interested Party service by completing the attached application and selecting the "Interested Party" option. If you do not want to take advantage of the SelectLink or Combined Mail services, but you would like to establish an Interested Party mailing, contact your investment professional or financial organization.

LINK YOUR ACCOUNTS TODAY

To sign up for SelectLink, complete the enclosed application (only one residence per application) and separate it at the perforations.

Return the application to your investment professional or financial organization.

[1] SelectLink can consolidate all accounts sharing the same mailing address from an individual firm in a single mailing. However, accounts from multiple firms with the same address will be distributed in one mailing per firm.

SELECTLINK® COMBINED MAIL APPLICATION

Please provide the following information for the accounts to be included in your SelectLink and/or Combined Mail statement package. As you complete this form, keep in mind that **to qualify for the SelectLink and Combined Mail options, all accounts must have the same mailing address.**

Identify the accounts that you would like to include in the SelectLink summary by checking the box in the "SelectLink" column. If you would like to have multiple account statements in your household included in the same envelope, but not consolidated on the SelectLink summary page, please mark the box in the "Combined Mail" column. If you would like to have copies of Interested Party statements included within your SelectLink and/or Combined Mail package, please select the box in the "Interested Party" column. **NOTE:** If you do not want to take advantage of the SelectLink or Combined Mail services, but you would like to establish an Interested Party mailing, contact your investment professional or financial organization.

The name of the first account indicated below will become the account to which all statements will be sent. Return the completed application to your investment professional or financial organization.

ACCOUNT INFORMATION (Please indicate the address of the first account, which will designate the primary mailing address)

NAME: ______________________________

STREET ADDRESS: ______________________________

CITY: ____________________ STATE: __________ ZIP: __________

1

ACCOUNT NUMBER: ☐☐☐ — ☐☐☐☐☐☐

SELECTLINK ☐ COMBINED MAIL ☐ INTERESTED PARTY ☐

(Please check all that apply.)

Primary Account Owner's Signature	Joint Account Owner's Signature (if applicable)	Additional Account Owner's Signature (if applicable)

2

ACCOUNT NUMBER: ☐☐☐ — ☐☐☐☐☐☐

SELECTLINK ☐ COMBINED MAIL ☐ INTERESTED PARTY ☐

(Please check all that apply.)

Primary Account Owner's Signature	Joint Account Owner's Signature (if applicable)	Additional Account Owner's Signature (if applicable)

3

ACCOUNT NUMBER: ☐☐☐ — ☐☐☐☐☐☐

SELECTLINK ☐ COMBINED MAIL ☐ INTERESTED PARTY ☐

(Please check all that apply.)

Primary Account Owner's Signature	Joint Account Owner's Signature (if applicable)	Additional Account Owner's Signature (if applicable)

LOAC

4

ACCOUNT NUMBER: ☐☐☐ — ☐☐☐☐☐☐

SELECTLINK ❑ **COMBINED MAIL** ❑ **INTERESTED PARTY** ❑

(Please check all that apply.)

Primary Account Owner's Signature	Joint Account Owner's Signature (if applicable)	Additional Account Owner's Signature (if applicable)

5

ACCOUNT NUMBER: ☐☐☐ — ☐☐☐☐☐☐

SELECTLINK ❑ **COMBINED MAIL** ❑ **INTERESTED PARTY** ❑

(Please check all that apply.)

Primary Account Owner's Signature	Joint Account Owner's Signature (if applicable)	Additional Account Owner's Signature (if applicable)

6

ACCOUNT NUMBER: ☐☐☐ — ☐☐☐☐☐☐

SELECTLINK ❑ **COMBINED MAIL** ❑ **INTERESTED PARTY** ❑

(Please check all that apply.)

Primary Account Owner's Signature	Joint Account Owner's Signature (if applicable)	Additional Account Owner's Signature (if applicable)

7

ACCOUNT NUMBER: ☐☐☐ — ☐☐☐☐☐☐

SELECTLINK ❑ **COMBINED MAIL** ❑ **INTERESTED PARTY** ❑

(Please check all that apply.)

Primary Account Owner's Signature	Joint Account Owner's Signature (if applicable)	Additional Account Owner's Signature (if applicable)

8

ACCOUNT NUMBER: ☐☐☐ — ☐☐☐☐☐☐

SELECTLINK ❑ **COMBINED MAIL** ❑ **INTERESTED PARTY** ❑

(Please check all that apply.)

Primary Account Owner's Signature	Joint Account Owner's Signature (if applicable)	Additional Account Owner's Signature (if applicable)

Please note that ALL account owners' signatures are required.

❑ Please check the box here and complete another copy of this form if you would like to combine more than eight accounts.

For Broker-Dealer Use Only

Correspondent Number	Group Name	Process by (Print Name)	Process By (Signature)	Date