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Account Application



TYPE OF ACCOUNT

(Please select one from the list)

- Individual
- Trust, Partnership, Corporation
- Uniform Gift to Minor
- Estate
- Joint Tenant

Additional beneficial owner form may be required. In the case of a trust, we ask that you fill out this section and supply a copy of the first and last page of your trust document. For other entities, we ask that you include the first page, powers page, and signature of the Corporate Resolution, Partnership Agreement or other official IRS Document, as applicable. In the case of a trust, we ask that you fill out this section and supply a copy of the first and last page of your trust document.

Name:

Date:

Tax ID Number:

PRIMARY ACCOUNT OWNER INFORMATION

Owner Minor Trustee

First Name: _____ Middle Name: _____ Last Name: _____

Street Address: _____ City: _____ State: _____ Zip Code: _____

Mobile Number: _____ Home Number: _____ E-mail: _____

Date of Birth: _____ Social Security Number: _____ I am a U.S. citizen (please select one option):
 Yes No

SECONDARY ACCOUNT OWNER INFORMATION

Joint Owner Custodian Co-trustee

First Name: _____ Middle Name: _____ Last Name: _____

Street Address: _____ City: _____ State: _____ Zip Code: _____

Mobile Number: _____ Home Number: _____ E-mail: _____

Date of Birth: _____ Social Security Number: _____ I am a U.S. citizen (please select one option):
 Yes No

INITIAL INVESTMENT - RENTX

(Please select one from the list)

- \$250,000 \$50,000 \$5,000
- \$100,000 \$25,000 Other

MONTHLY AUTOMATIC INVESTMENT* - RENTX

(Please select one from the list)

- \$5,000 \$250 Other
- \$1,000 No Thanks

** Automatic investment is processed by the 5th of every month. Call to make changes. There is a \$25.00 fee if the automatic purchase cannot be made due to insufficient funds, stop payment, or for any other reason.*

DIVIDEND OPTIONS

Reinvestment: all dividends will be reinvested into your account

Opt out and the dividends will be paid in cash to you

TELEPHONE AND EXCHANGE PRIVILEGES

Exchange Privileges: Permits exchanges between funds via telephone request

Statement Delivery: Statements, tax forms and regulatory documents delivered electronically

Opt out of exchange privileges

Opt out (additional fees may apply for paper delivery)

