

# **Change of Registration Form**

(Use this form for non-retirement accounts only)

Regular Mail:

Bridges Investment Fund c/o U.S. Bank Global Fund Services PO Box 219252 Kansas City, MO 64121-9252 **Overnight Delivery:** 

Bridges Investment Fund c/o U.S. Bank Global Fund Services 801 Pennsylvania Ave Suite 219252 Kansas City, MO 64105-1307

This form should be used to change the registration of an existing account. A New Account Application must accompany the form unless noted.

1 Current Account Registration		
NAME OF TAXABLE OWNER / MINOR / TRUST		SOCIAL SECURITY NUMBER / TAX ID
NAME OF JOINT OWNER / CUSTODIAN / TRUSTEE		SOCIAL SECURITY NUMBER / TAX ID
NAME OF JOINT OWNER / TRUSTEE		SOCIAL SECURITY NUMBER / TAX ID
FUND NAME		ACCOUNT NUMBER
FUND NAME		ACCOUNT NUMBER
FUND NAME		ACCOUNT NUMBER
PERMANENT STREET ADDRESS		DAYTIME TELEPHONE NUMBER
L CITY	J L STATE	ZIP CODE

□ If this box is checked, I/we give U.S. Bank Global Fund Services authorization to update the address of record to the address listed above if it is different than our records. All accounts associated with the Social Security number(s) or Tax ID number(s) provided with the new address will be updated. A signature of all owners must be included in the Signature and Certification section in order for this change to be valid.

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Z Reason for Registration Change (please select one)						
☐ Individual or Joint Account To Trust or Entity Account (complete the Individual or Joint Account to Trust or Entity Account section and Signature and Certification section)						
☐ Remove or add an account owner or trustee (complete the Remove or Add an Account Owner or Trustee section and Signature and Certification section)						
☐ Relinquish UTMA account to taxable owner who has reached age of termination (complete the Relinquish UTMA to Taxable Owner section and Signature and Certification section)						
□ Change custodian on UTMA account as permitted under state law (complete the Change Custodian on UTMA section Signature and Certification section)						
☐ <b>Gift shares to an individual or entity</b> (complete the Gift Shares to an Individual or Entity section and Signature and Certification section)						
3 Individual or Joint Account to Trust or Entity Account						
For Trust accounts, a complete copy of your trust agreement or a notarized Certificate of Trust is required.  For Entity accounts, Entity documentation and a list of authorized signers are required.						
NAME OF TRUST / ENTITY SOCIAL SECURITY NUMBER / TAX ID						
TRUSTEE / AUTHORIZED SIGNER						
TOURTES (AUTURNITED GROVED						
TRUSTEE / AUTHORIZED SIGNER						
Please attach a separate sheet if there are more than two trustees or authorized signers.						
Signature Requirements: - All current account owners must sign in the Signature and Certification section.						
- If a current account owner is not listed as a grantor of the trust, they must obtain a signature guarantee in the Signature and Certification section If reregistering to an Entity, all account owners must obtain a signature guarantee in the Signatures section.						
4 Remove or Add an Account Owner or Trustee						
For Trust accounts, a complete copy of your trust agreement or a notarized Certificate of Trust is required.						
ACCOUNT OWNER / TRUSTEE TO REMOVE						
ACCOUNT OWNER / TRUSTEE TO REMOVE						
ACCOUNT OWNER / TRUSTEE TO ADD						

## ACCOUNT OWNER / TRUSTEE TO ADD

#### **Signature Requirements:**

- All current account owners must sign in the Signature and Certification section.
- Any account owner or trustee to be removed must obtain a signature guarantee in the Signature and Certification section.

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3 Relinquish UTMA or UGMA to Taxable Owner (taxab	ple owner has reached ag	ge of termination)
Please note that the age of majority and age of termination for U	TMA/UGMA accounts differ	s by state.
NAME OF TAXABLE OWNER (FORMER MINOR)	DATE OF BIRTH (MM / DD / YYYY	) PHONE NUMBER
PERMANENT STREET ADDRESS		
OUTV LOTATE LZID CODE		
CITY / STATE / ZIP CODE  A New Account Application completed and signed by the forme	r minor is required to relinqui	sh the account to the former minor.
Signature Requirements: - Former minor has reached the age of termination: The former minor mu or notary stamp is required.	ıst sign in the Signature and Cer	rtification section. No signature guarantee
6 Change of Custodian on UTMA or UGMA (removing of	current custodian; adding n	ew/successor custodian)
An application is not required. Please complete the information I	below for the new custodia	n.
Note: In compliance with the USA PATRIOT Act, all mutual funds are require owners and all authorized individuals. This information is used to verify your and we may request additional information for verification purposes.		
NAME OF NEW CUSTODIAN		
TANKE OF NEW OCCIODAN		
SOCIAL SECURITY NUMBER / TAX ID	DATE OF BIRTH (IF APPLICABLE)	
PERMANENT STREET ADDRESS (P.O. BOX IS NOT ACCEPTABLE)		DAYTIME TELEPHONE NUMBER
CITY	STATE	ZIP CODE
MAILING ADDRESS (IF APPLICABLE)		ALTERNATE TELEPHONE NUMBER
CITY	STATE	ZIP CODE
Signature Requirements: - The signature of the current custodian in the Signature and Certification so - The new custodian must sign below, or they may submit a separate signe - The signature of a witness to the executing and dating of this request must	d letter of acceptance.	·
By signing below, I accept the appointment to act as the custodian on the ac section. I also confirm that the information listed above is correct.	count(s) referenced in the Curre	ent Account Registration
x		
SIGNATURE OF NEW CUSTODIAN		DATE (MM/DD/YYYY)
By signing below, I confirm that I witnessed the executing and dating of this	request.	
X		
SIGNATURE OF WITNESS		L DATE (MM/DD/YYYY)

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## 7 Gift of Shares to an Individual or Entity

### The date of the gift is deemed the date we receive all documentation required to process the transfer unless otherwise noted.

Note to recipient(s) of gift: If shares are gifted at a loss and you have chosen Average Cost as your cost basis method, the Fair Market Value of the shares as of the date of the gift will be applied.

Amou	nt of Gift:	
	Dollar amount to be gifted \$	
	Number of shares to be gifted	
Depos	it to:	
	An Existing Account Number	
	A New Account (an application must accompany the form)	
NAME OF G	IFT RECIPIENT	
SOCIAL SEC	CURITY NUMBER / TAX ID	DATE OF BIRTH (MM/DD/YYYY)
Amoui	nt of Gift:	
	Dollar amount to be gifted \$	
	Number of shares to be gifted	
Depos	it to:	
	An Existing Account Number	
	A New Account (an application must accompany the form)	
NAME OF G	IFT RECIPIENT	
SOCIAL SEC	CURITY NUMBER / TAX ID	DATE OF BIRTH (MM/DD/YYYY)

Please attach a separate sheet if gifting to more than two recipients.

#### **Signature Requirements:**

- All current account owners must sign in the Signature and Certification section and obtain a signature guarantee.

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# 8 Signature & Certification

#### Please review the applicable Signature Requirements prior to completing this section.

I have received and understand the prospectus for my mutual fund. I understand the Fund's investment objectives and policies and agree to be bound by the terms of the prospectus. I agree to notify the Fund of any errors or discrepancies within 45 days after the date of the statement confirming a transaction. The statement will be deemed to be correct and the Fund and its transfer agent shall not be liable if I fail to notify the Fund within such time period. I certify that I am of legal age and have legal capacity to initiate requests on the selected accounts.

I understand that my mutual fund account may be transferred to my state of residence if no activity occurs within my account during the inactivity period specified in my state's abandoned property laws.

I, the undersigned, authorize and request that U.S. Bank Global Fund Services, take the requested action on the account(s) listed in section 1. I certify that all information provided on this form is accurate and agree to indemnify, release, and hold U.S. Bank Global Fund Services harmless for any actions taken as a result of the information I have provided (including that the age of termination for UTMA has been attained, if the Relinquish UTMA to Taxable Owner section is completed above).

The undersigned acknowledges that it is his/her responsibility to properly calculate, report, and pay all taxes due with respect to the request herein specified. I have been advised to consult my tax advisor regarding any questions about this request.

Under penalty of perjury, I certify that:

- (1) the Social Security or taxpayer identification number shown on this form is my correct taxpayer identification number, and
- (2) I am not subject to backup withholding as a result of either being exempt from backup withholding, not being notified by the IRS of a failure to report all interest and dividends, or the IRS has notified me that I am no longer subject to backup withholding, and
- (3) I am a U.S. person (including a U.S. resident alien), and
- (4) I am exempt from FATCA reporting.

(Cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding due to a failure to report all interest and dividends).

The IRS does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

X						
SIGNATURE					DATE (MM/DD/YYYY)	
□ Account Owner		Trustee	Custodian	Other	 	
Х						
SIGNATURE					DATE (MM/DD/YYYY)	
☐ Account Owner		Trustee	Custodian	Other	 ,	
Х						
SIGNATURE					 DATE (MM/DD/YYYY)	
☐ Account Owner		Trustee	Custodian	Other	 	
				$\neg$		
SIGNATURE GUARANTEE	/ NOTAR	Y STAMP		DATE (MM/DD/YYYY)		

A signature guarantee or a signature validation may be obtained from an officer of a bank, savings association, credit union, a member firm of a domestic stock exchange, or the Financial Industry Regulatory Authority, that is an eligible guarantor institution. A notary public from a financial institution is also able to provide an acceptable guarantee only if indicated within the Signature Requirements for the section(s) you have completed. The notary public's business card or a signed letter from the notary public on the financial institution's letterhead must accompany the form.