



Regular mail: ESG Managers® Portfolios PO Box 9824 Providence, RI 02940-8024	Overnight mail: ESG Managers® Portfolios 101 Sabin Street Pawtucket, RI 02860-1427 Telephone: 888.374.8920
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Optional Account Services Form

Use this form to:

1. Authorize Telephone Exchange, Purchase* and Redemption* privileges for your ESG Manager account;
2. Provide banking information for the Electronic Transfer of Funds between your ESG Managers® account(s) and your checking or savings account;
3. Establish an Automatic Investment Plan for your ESG Managers® account.
4. Establish a Systematic Withdrawal Plan for your ESG Managers® account.

For help with filling out this form please call Shareholder Services at 888.374.8920 between 8AM and 6PM ET M-F.

A. Please tell us about your existing account(s):

Fund Name	Class	Account number	
Fund Name	Class	Account number	
Fund Name	Class	Account number	
Account Owner's Name	Social Security/Tax ID No.		
Joint Account Owner's Name	Social Security/Tax ID No.		
Street Address ()	City ()	State	Zip Code
Evening Phone	Daytime Phone		

B. Please check the options you wish to add to your account:

- Telephone Exchange** – allows you to move funds between identically registered accounts.
- Telephone Redemption*** – complete Section C below to allow Telephone Redemptions* to be electronically transmitted to your bank account. If this box is checked and Section C is not completed, Telephone Redemptions* will be mailed to your address of record. Completing Section C below will also allow Telephone Purchases.
- Automatic Investment (Section C is required for this option)** – allows you to invest automatically each month or quarter by electronically debiting your checking or savings account. Funds are transferred via the Automated Clearing House (ACH) system, and the plan takes approximately 20 days to become effective.

IRA accounts: Contributions made via Automatic Investment Plan will be considered current year contributions.

SEP IRA accounts: Please indicate the contribution type Employer Personal IRA (If undesignated, contributions will be considered current year employer)

Please invest \$_____ on the _____ day of each month or quarter, beginning in the month of _____
 If you do not select a date for Automatic Investment, the 20th of the month will be selected as the investment date. *If the selected date falls on a weekend or holiday, your Automatic Investment will take place on the next available business day. You will receive quarterly confirmation of these transactions.*

Please automatically purchase into the following Fund(s):

ESG Managers® Aggressive Growth Portfolio	\$_____ or _____% (min. \$50)
ESG Managers® Growth Portfolio	\$_____ or _____% (min. \$50)
ESG Managers® Moderate Portfolio	\$_____ or _____% (min. \$50)
ESG Managers® Conservative Portfolio	\$_____ or _____% (min. \$50)

