



# Mutual Fund Reregistration Request

PO Box 2760 ■ Omaha, NE 68103-2760  
Fax: 866-468-6268

## 1. TD AMERITRADE ACCOUNT INFORMATION

Account Number:

Name as it appears on your account:

I authorize TD Ameritrade to register the following mutual fund holdings in my name so I may hold them directly with the mutual fund company. I understand that the position(s) will no longer appear on my TD Ameritrade statement and that the fund company will be responsible for any statement or government tax reporting once the position is in my name.

Name of Fund:

CUSIP or Symbol Position Value:  
\$

Check one:

- Open a new account at fund.  
I would like my dividends and capital gains to be:  Reinvested or  Paid in cash
- Place in existing account at fund (dividend and capital gain options will remain the same).

Existing Account Number at Fund:

Title of Account at Fund:

## 2. MUTUAL FUND ACCOUNT INFORMATION

Name of Fund:

CUSIP or Symbol Position Value:  
\$

Check one:

- Open a new account at fund.  
I would like my dividends and capital gains to be:  Reinvested or  Paid in cash
- Place in existing account at fund (dividend and capital gain options will remain the same).

Existing Account Number at Fund:

Title of Account at Fund:

## 3. SIGNATURES

**Stop! If the aggregate value of the transfer is \$50,000 or more, you must sign this in the presence of a Medallion signature guarantor at a bank, member of a national securities exchange, savings and loan association, credit union, broker, or other acceptable financial institution that is a member of an approved signature guarantee Medallion Program.**

**If this is a Joint account, all Account Owners must sign.**

<input checked="" type="checkbox"/> Account Owner's Signature:	Date: _____
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<input checked="" type="checkbox"/> Account Co-Owner's Signature:	Date: _____
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*Original signatures required, electronic and/or signature fonts are not authorized.*

Investment Products: Not FDIC Insured \* No Bank Guarantee \* May Lose Value

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