

REDEMPTION AUTHORIZATION FORM

Do not use for MFS-sponsored IRAs or for other MFS-sponsored retirement plans.



1. About You

This form is for individual accounts, joint accounts, or trust accounts. Additional documentation may be required for accounts registered under the Uniform Gifts/Transfers to Minors Act or other registrations.

ACCOUNT REGISTRATION

ACCOUNT REGISTRATION CONTINUED

ACCOUNT REGISTRATION CONTINUED

- -

SOCIAL SECURITY NUMBER

PHONE NUMBER

MAILING ADDRESS

CITY

STATE

ZIP CODE

☐

This is my new address; please update my account information. (A Medallion Signature Guarantee is required in Section 5.)

Note: If the new address is a non-U.S. address, you will be restricted from making additional purchases into this account and exchanges into and out of this account.

FINANCIAL PROFESSIONAL'S NAME

FINANCIAL PROFESSIONAL'S PHONE NUMBER

2. Redemption Instructions

Please provide your fund and account number(s). They are printed on your Investment Summary statement. The fund number is the first four digits before the hyphen and the account number follows the hyphen. Indicate the amount to be sold. If the amount requested exceeds the account balance, all shares in the account will be sold. If your request includes recently purchased shares, MFS Service Center, Inc. (MFSC) may delay the payment of redemption proceeds of those shares for a period of up to seven business days in order to enable MFSC to confirm that the funding has cleared. These redemption proceeds will generally be sent separately in the form of a check.

Note: If you elect to redeem all shares from any of your MFS accounts, any existing Automatic Investment or Exchange Options on the redeemed accounts will be discontinued.

FUND NUMBER	ACCOUNT NUMBER	AMOUNT	SHARES	SELECT ONE:	
				DOLLARS	ALL
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐

3. Cost Basis

If you have not made a cost basis method election, or you have but did not notify MFSC of your elected method, MFSC has applied the fund’s default method of Average Cost to your account. **If you choose an override and you have Average Cost as the elected method or fund’s default method on your account, your request will not be considered in good order and MFSC will not process your request.**

Cost Basis Method Override: If you have a cost basis method other than Average Cost on your account, you may override your account method by choosing another cost basis method below to be applied to this transaction only. If you do not wish to override your cost basis method, proceed to Section 4.

Note: This will not change the current method on your account. If you wish to change the current cost basis method on your account you may do so via MFS Access or by completing and sending in a Cost Basis Reporting Selection/ Change Form.

- ☐ First in, First out
- ☐ Last in, First out
- ☐ High cost
- ☐ Low cost
- ☐ Loss/Gain utilization
- ☐ Specific Lot Identification – if this method is chosen you must submit a separate SLID Form

Unless you directed MFSC in the Override Section above, the cost basis method that is currently on your account will be used to deplete the shares for this transaction. If you have Specific Lot Identification as the cost basis method on your account, you will need to complete the Specific Lot Identification Lot Selection Form (the “SLID Form”) and submit it with this redemption request. If you do not submit the SLID Form with your redemption request, MFS will deplete your tax lots in accordance with the secondary method selected on your account. You may obtain the SLID Form by going to **mfs.com/Forms**. The form is located under “Non-Retirement Accounts,” and then “Sell Shares or Close an Account.” To learn more about the different cost basis methods please contact your financial professional or tax advisor. You may also visit **mfs.com/TaxCenter**.

4. Payment Instructions [Choose one]

Note: If no instructions are provided, a check will be mailed to the address of record.

- ☐ Make check payable to me and mail to my address of record.
(A Medallion Signature Guarantee is required in Section 5 if the address has changed in the last 30 days.)
- ☐ Make a check payable to a special payee and/or mail to a special address, as provided below.
(A Medallion Signature Guarantee is required in Section 5.)

SPECIAL PAYEE

SPECIAL ADDRESS

CITY

STATE

ZIP CODE

- ☐ Direct deposit the proceeds to my bank account. I have attached an original voided check and/or preprinted deposit slip. In lieu of an original voided check or deposit slip, you may submit a letter from your bank providing the name(s) on the account, routing number, and account number. The letter from the bank must be on their letterhead.

A Medallion Signature Guarantee is required in Section 5 if the bank information provided is not yet on file or has been added or updated on your account within the past 30 days.

If direct deposit was selected, please indicate the type of account, select one of the following methods of deposit, and provide bank account information below, which will be compared with the voided check or preprinted deposit slip to ensure accuracy.

All fields below must be completed to send the funds via direct deposit.

Type of Account: ☐ Checking ☐ Savings

- ☐ ACH - If this method is chosen, the bank information provided must have an owner in common with the MFS account registration.
- ☐ Wire

NAME(S) ON CHECKING/SAVINGS ACCOUNT **(REQUIRED)**

BANK NAME **(REQUIRED)**

BANK ACCOUNT NUMBER **(REQUIRED)**

BANK ROUTING NUMBER **(REQUIRED)**

Attach an original voided check or preprinted deposit slip.

If the bank information provided has an owner in common with the MFS account registration, the bank information will be added to your account. If you do not wish to retain the bank information on your account, please attach a letter of instruction.

5. Authorization

Please sign your name exactly as it appears on your account. By signing, you acknowledge that you are aware of any fees or sales charges associated with this transaction.

Note: If you are acting on behalf of the owner, please select the appropriate option indicating the capacity in which you are acting. If not listed, please check "Other" and specify your capacity. A Medallion Signature Guarantee is required below if you are acting on behalf of the account owner.

- ☐ Attorney-in-fact ☐ Custodian ☐ Executor(trix) ☐ Former Minor ☐ Trustee
- ☐ Other (please specify) _____

SIGNATURE (ALL OWNERS OF THE ACCOUNT MUST SIGN.)

DATE (MM/DD/YYYY)

PRINT NAME

SIGNATURE (ALL OWNERS OF THE ACCOUNT MUST SIGN.)

DATE (MM/DD/YYYY)

PRINT NAME

Medallion Signature Guarantee

A Medallion Signature Guarantee is **required** if:

- Your total distribution is more than \$100,000, or
- Your check is made payable to a different name, or
- You are signing in capacity or acting on behalf of the shareholder, or
- Your check is mailed to an address other than the address of record, or
- The proceeds are direct deposited to your bank account (see Section 4), or
- You have notified MFS of an address change within 30 days of this request.

AFFIX GUARANTEE STAMP HERE

Medallion Signature Guarantee stamp must not be dated. The signature(s) must be guaranteed by an eligible bank, broker, dealer, credit union, national securities exchange, registered securities association, clearing agency, or savings association. Medallion Signature Guarantees will be accepted in accordance with policies established by MFS Service Center, Inc. Notarization by a notary public is not acceptable in lieu of a Medallion Signature Guarantee provided by one of the eligible guarantor institutions listed above.

If you have any questions about this form, please call 1-800-225-2606 any business day.

Mail completed form to:

Regular mail

MFS Service Center, Inc.
P.O. Box 219341
Kansas City, MO 64121-9341

Overnight mail

MFS Service Center, Inc.
801 Pennsylvania Ave, Suite 219341
Kansas City, MO 64105-1307