

# ADDITIONAL INVESTMENT FORM FOR MFS® NON-RETIREMENT ACCOUNTS



## 1. Account Information

ACCOUNT OWNER'S NAME \_\_\_\_\_

□□□□-□□□□-□□□□□□  
SOCIAL SECURITY NUMBER

□□□□/□□□□/□□□□□□  
DATE OF BIRTH (MM/DD/YYYY)

\_\_\_\_\_  
PHONE NUMBER

MAILING ADDRESS \_\_\_\_\_

\_\_\_\_\_  
CITY

\_\_\_\_\_  
STATE

\_\_\_\_\_  
ZIP CODE

This is my new address; please update my account information.  
(Please check the box and sign only if applicable.)

\_\_\_\_\_  
SHAREOWNER'S SIGNATURE

**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. List Individual Investments

Purchases can also be made directly from your checking/savings account online or by telephone. Please visit [mfs.com](http://mfs.com) or contact the MFS Service Center at 1-800-225-2606 to learn more about these services.

FUND NUMBER	ACCOUNT NUMBER	FUND NAME/SHARE CLASS (example: MIT Fund – A)	AMOUNT
□□□□	_____	_____	\$ _____
□□□□	_____	_____	\$ _____
□□□□	_____	_____	\$ _____
□□□□	_____	_____	\$ _____
<b>Total investment amount:</b>			\$ _____

**Please make your investment check payable to the MFS Service Center and mail 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

### Important Notes:

- Minimum additional investment amount is \$50 per fund via check for non-retirement accounts.
- To establish a **new** fund within your existing type of account in **the same share class**, write the word "NEW" in the space provided for the account number.
  - The minimum initial investment amount is \$1,000 to establish a new account.
  - Please read the fund's prospectus and consult your financial professional with any questions before investing in a new MFS fund.
- Please use more than one form if you have more than four additional investments.
- If you are investing in a new share class, a new account application is required.
- Funds will be invested on the first business day of receipt as long as the investment instructions are completed in full.