ADDITIONAL INVESTMENT FORM FOR MFS® TRADITIONAL AND ROTH IRA ACCOUNTS

1. Account Information

IRA OWNER'S FIRST NAME | MI | LAST 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.

REGISTERED REPRESENTATIVE'S NAME | REGISTERED REPRESENTATIVE'S PHONE NUMBER

2. List Individual Investments

Note: Purchases can also be made directly from your checking/savings account online or by telephone. Please visit **mfs.com** or contact the MFS Service Center at 1-800-637-1255 to learn more about these services.

FUND NUMBER	ACCOUNT NUMBER	FUND NAME/SHARE CLASS (for example: MIT Fund – A)	AMOUNT
			$
			$
			$

Total investment amount: $

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 Retirement accounts.
- To establish a **new** fund within your existing account type in **the same share class**, write the word "NEW" in the space provided for the MFS Fund Account Number.
  - The minimum initial investment amount is $250 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.
- If you are investing in a new share class, a new account application is required.
- Please use more than one form if you have more than three additional investments.
- Internal Revenue Service rules allow only one IRA-to-IRA rollover in any twelve-month time period, regardless of the number of IRAs an individual has or the types of IRAs (including traditional, Roth, SEP, and SIMPLE IRAs). Exceeding this limit, even if the prior rollover involved a different type of IRA, will result in an excess contribution to your IRA subject to taxation and penalties. Roth conversions (rollovers from traditional IRAs to Roth IRAs), rollovers between qualified plans and IRAs, and trustee-to-trustee transfers – direct transfers of assets from one IRA trustee to another – are not subject to the one-per-year limit and are disregarded in applying the limit to other rollovers. You may want to consult with your tax advisor before making a rollover.
- If the Tax Year is not indicated, or if the contribution is received after the prior-year IRS deadline, the contribution will be made for the current year.
- Funds will be invested on the first business day of receipt as long as the investment instructions are completed in full.