Account application guide and checklist

Tips for setting up your account

MFS® INVESTMENT MANAGEMENT

Fill in the application completely and clearly. Incomplete information may delay establishing your account, or we may have to return the application and your check.

Remember to link your checking/savings account information so you can quickly and easily add money to or withdraw money from your mutual fund account.

Individuals: When registering, make sure to print and sign your name the same way as you have or would for other financial accounts. For example, if you have registered for other accounts as John R. Jones, do not register for this one as John Jones or J.R. Jones. Also, consider using the "Transfer on Death" registration to quickly transfer proceeds to your named beneficiaries in the event of your death.

Trusts, organizations, and legal entities: Additional documentation may be needed for certain services. To make sure that you register in the way best suited to your situation, talk to your financial and tax advisors. If you are not sure how to register or need additional assistance, talk to your financial advisor or call an MFS® service representative at 1-800-225-2606 any business day.

Section 1
About you

Select the type of account and fill in all of the information requested. Include additional documentation as needed for nonindividual accounts.

A. To open an individual or joint account, the following information is required for each owner listed:

- Name
- Date of birth
- Social Security number

B. To open an account under Uniform Gift/Transfer to Minors (UGMA/UTMA), the following information is required:

- Custodian's name, Social Security number, and date of birth
- Applicable state for UGMA/UTMA
- Minor's name, Social Security number, and date of birth

C. To open a Trust account, the following information is required:

- Tax identification number (TIN) for the Trust
- Date of Trust formation
- Name of the Trust (exactly as it appears in the trust documents)
- Trustee, and if applicable, cotrustee

D. To open an account for an organization or legal entity, the following information is required:

- Tax ID/Employer ID number
- Name of the entity
- Names(s), Social Security number(s), and date(s) of birth of authorized signer(s)

E. Address

Provide the street address for each owner on the account. If the mailing address is different than the street address (for example, a post office box), provide the mailing address as well.

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SECTION 2
SELECT YOUR INVESTMENTS

Choose the appropriate fund and fund number(s) for your investment. You can find the fund list and fund numbers on the last page of the application. If you do not want dividends and capital gains reinvested, check the last box in this section and complete Section 8.

SECTION 3
WAYS TO REDUCE THE SALES CHARGE ON YOUR CLASS A SHARES

Make sure you pay the lowest sales charge on your Class A share purchases by linking all of your eligible accounts for Right of Accumulation or by letting us know if you will be investing more over the next 13 months (36 months if you intend to invest $1 million or more) to qualify for a lower sales charge with a Letter of Intent.

SECTION 4
DEALER INFORMATION

Make sure all of the dealer information, including the signature of an authorized person for the firm, is provided. MFS® cannot accept an application without complete dealer information.

SECTION 5
YOUR SIGNATURE AND CERTIFICATION

Each owner or authorized signer named in Section 1 must sign and date the application. Please read this section carefully to ensure the proper tax withholding information is provided.

Optional account services
Review the optional account services in Sections 6 through 10 with your financial advisor to determine what additional services you would like on your account.