

# Brokerage CheckWriting Service Authorization



Complete this form to establish CheckWriting service on your brokerage account.

- CheckWriting is not available for IRAs.

CheckWriting service gives you easy access to your brokerage account. You have the opportunity to earn attractive rates, based on market conditions, while keeping your money readily available. CheckWriting service offers:

- **Unlimited CheckWriting:** Write as many checks as you like against your margin cash available or brokerage money market fund balances.
- **One consolidated statement:** One consolidated statement from American Century Investments® brokerage includes your CheckWriting activity.

If you have a margin account, you can benefit from CheckWriting borrowing privileges. When you write a check, CheckWriting uses the funds available in your account, and then automatically extends you a line of credit for the rest. The amount of money you can borrow is based on the loan value of marginable securities in your account.

Please note, if you also have CheckWriting on an American Century Investments mutual fund account, you cannot use the same checks for your brokerage account.

**Please print clearly in CAPITAL letters using black ink and include all signatures on page 2.**

## 1 Provide Your Account Information

4MV-

Account number

Primary account owner or Trustee's first name

Middle initial

Primary account owner or Trustee's last name

The name and address that will appear on your checks will be taken from your brokerage account. You may add one additional line of information on your checks, such as your telephone number. Please indicate any additional information you would like to include (not to exceed 32 characters per line including spaces).

You may choose not to include your address, by checking the box below, or include an additional line.

Do not include an address on my checks.

Include additional information:

Optional additional information (e.g., telephone number)

### **BillSuite™ (optional – available for Standard and Corestone Accounts® with CheckWriting domiciled in the U.S.)**

BillSuite enables you to view, pay and manage bills online. BillSuite is available for all Standard and Corestone Accounts that have CheckWriting at no additional charge. You may use this service by going online to your brokerage account at [americancentury.com/brokerage](http://americancentury.com/brokerage). For questions please contact us at 1-888-345-2071.

I would like to establish BillSuite on this account.

## 2 Fees

**Standard Account CheckWriting**—CheckWriting accounts with average month-end closing money market sweep balances below \$25,000 will be charged a \$25 annual fee. The fee will be charged in the anniversary month of the CheckWriting account setup. This fee is waived for Platinum, Gold and Silver Priority Investors.

Brokerage may return checks unpaid and automatically deduct a fee from your account for (fees are subject to change):

- Checks drawn on insufficient funds (\$25 fee)
- Cancelled check copies (\$2.50 fee)
- Stop payments (\$25 fee)

### 3 To Add Additional Signatures (UGMA/UTMA accounts are not eligible)

If you have an individual or joint account and would like to add other signatories (for individuals who are not listed on the account registration), please have the additional signatories provide all information and sign below.

Printed name	Tax ID/SSN	Mother's maiden name/OR Code name (max.13 characters)	Additional signer's date of birth
--------------	------------	--	-----------------------------------

➔ **Additional signature**

**Date**

Printed name	Tax ID/SSN	Mother's maiden name/OR Code name (max.13 characters)	Additional signer's date of birth
--------------	------------	--	-----------------------------------

➔ **Additional signature**

**Date**

The primary account owner authorizes the additional signatures on this form by signing below.

➔ **Primary account owner signature**

**Date**

### 4 Read and Sign Your Name Below

- I further request The Bank of New York Mellon to issue checks as indicated on this form. Prior to signing below, I have received and read Section II of the *Customer Agreement*, as currently in effect and as amended from time to time, which governs my Corestone Account, and I agree to be bound by such agreement.
- Interest on debit balances will be charged and compounded in accordance with the Corestone Account Agreement, as applicable.
- This agreement, with respect to all portions of the American Century Investments brokerage Corestone Account, including interest charges on loans Pershing LLC (American Century Brokerage's clearing agent) may make to me, will be governed by and interpreted under the laws of the State of New York.
- CheckWriting activity will be displayed on your account statement. Your cleared checks will be visible on your brokerage account website. Brokerage may return checks unpaid and automatically deduct a fee from your account for certain occurrences as described in step 2 (fees are subject to change).
- By signing this form, the Customer accepts the terms of the enclosed Corestone Account Agreement, Brokerage Fees and Commissions flier and BillSuite program rules where applicable.

BY SIGNING THIS AUTHORIZATION FORM, I ACKNOWLEDGE THAT SECURITIES NOT FULLY PAID FOR BY ME MAY BE LOANED TO PERSHING OR LOANED OUT BY PERSHING TO OTHERS.

I/WE HAVE READ AND AGREE TO THE TERMS AND CONDITIONS STATED ABOVE. I/WE AGREE THAT THIS AGREEMENT CONTAINS A PREDISPUTE ARBITRATION CLAUSE, WHICH IS LOCATED IN SECTIONS B.23 AND B.24, PAGE 14, AND SECTIONS 20 AND 21, PAGE 32, IN THE *CUSTOMER AGREEMENT*. I/WE ACKNOWLEDGE RECEIVING A COPY OF THIS AGREEMENT AND THAT ALL ACCOUNT OWNERS HAVE SIGNED THIS FORM. BY SIGNING WHERE INDICATED, I/WE AUTHORIZE THE ADDITIONAL SIGNATORIES ON THIS FORM.

Primary account owner or Trustee name	Tax ID/SSN	Mother's maiden name/OR Code name (max.13 characters)	Account owner's date of birth
--	------------	--	-------------------------------

➔ **Primary account owner or Trustee signature**

**Date**

Joint account owner or Trustee name	Tax ID/SSN	Mother's maiden name/OR Code name (max.13 characters)	Account owner's date of birth
--	------------	--	-------------------------------

➔ **Joint account owner or Trustee signature (if applicable)**

**Date**