

# **Coverdell Education Savings Account Application**

Mail to: Bridges Investment Fund c/o U.S. Bancorp Fund Services, LLC PO Box 701 Milwaukee, WI 53201-0701 Overnight Express Mail To: Bridges Investment Fund c/o U.S. Bancorp Fund Services, LLC 615 E. Michigan St., FL3 Milwaukee, WI 53202-5207

» In compliance with the USA PATRIOT Act, all mutual funds are required to obtain the following information for all registered owners and all authorized individuals: full name, date of birth, Social Security number, and permanent street address. This information will be used to verify your true identity. We will return your application if any of this information is missing, and we may request additional information for you for verification purposes. In the rare event that we are unable to verify your identity, the Fund reserves the right to redeem your account as an age-appropriate distribution at the current day's net asset value.

1 Designated Be	neficiary   Account Holder (Minor)
FIRST NAME	M.I. LAST NAME
PERMANENT STREET ADDRESS	(PO. BOX NOT ACCEPTABLE) CITY / STATE / ZIP  ☐ Check if minor should
SOCIAL SECURITY NUMBER	DATE OF BIRTH (MM/DD/YYYY)  receive statements.
2 Responsible Pa	arty
FIRST NAME	M.I. LAST NAME
THOTYANIE	W.I. EAST VANIL
PERMANENT STREET ADDRESS	(P.O. BOX NOT ACCEPTABLE) CITY / STATE / ZIP
DAYTIME PHONE NUMBER	RELATIONSHIP TO DESIGNATED BENEFICIARY SOCIAL SECURITY NUMBER
BIRTHDATE (MM/DD/YYYY)	DRIVERS LICENSE OR STATE I.D. NUMBER  STATE OF ISSUE
EMAIL ADDRESS	
	will be added to your account. If you do not want these options, check the boxes below.
	shes to continue to control the account after the Account Holder attains age of majority in his/her state in ns described in the optional portion of Article V of the Coverdell Education Savings Account agreement.
	y does not wish to control the account after age of majority.
	ay change the beneficiary designated under this agreement to another member of the designated beneficiary's
,	e VI of the Coverdell Education Savings Account agreement.
☐ The responsible part	y may not change the beneficiary.

3 Account	Type
Refer to disclosure	e statement for eligibility requirements and contribution limits.
Select one of th	ne following account types:
☐ Coverdell Edu	ucation Savings Account (CESA)
For Tax Year _	
Rollover Account	: – specify the type of rollover:
☐ Account H	Holder's CESA to Account Holder's CESA
☐ Qualifying	Family Member's CESA to Account Holder's CESA
☐ Transfer Acco	ount – a direct transfer from current CESA custodian.
4 Investme	ent Choices
\$1,000 Minimum	<ul> <li>■ By check: Make check payable to the Bridges Investment Fund.         Note: All checks must be in U.S. Dollars drawn on a domestic bank. The Fund will not accept payment in cash or money orders. The Fund does not accept post dated checks or any conditional order or payment. To prevent check fraud, the Fund will not accept third party checks, Treasury checks, credit card checks, traveler's checks or starter checks for the purchase of shares.     </li> <li>■ By wire: Call 866-934-4700.         Note: A completed application is required in advance of a wire.     </li> <li>Investment Amount \$</li> </ul>
5 Automati	ic Investment Plan (AIP)
	ation must be received at least 15 calendar days prior to initial transaction.
*	option, funds will be automatically transferred from your bank account. Please attach a voided check or savings ction 6 of this application. We are unable to debit mutual fund or pass-through ("for further credit") accounts.
Draw money fo	or my AIP (check one):   Monthly  Quarterly  Semi-Annually  Annually  If no option is selected, the frequency will default to monthly.
AMOUNT PER DRA	AW AIP START MONTH AIP START DATE
<ul> <li>Participation in</li> </ul>	if the automatic purchase cannot be made (assessed by redeeming shares from your account). In the plan will be terminated upon redemption of all shares. It is assessed by redeeming shares from your account). It is assessed by redeeming shares from your account). It is assessed by redeeming shares from your account). It is assessed by redeeming shares from your account). It is assessed by redeeming shares from your account). It is assessed by redeeming shares from your account). It is assessed by redeeming shares from your account). It is assessed by redeeming shares from your account). It is assessed by redeeming shares from your account). It is assessed by redeeming shares from your account).

## **6** Voided Check for Bank Information

Please attach a voided check or savings deposit slip to this application if you chose the Automatic Investment Plan. We are unable to debit or credit mutual fund or pass-through ("for further credit") accounts. Please contact your financial institution to determine if it participates in the Automated Clearing House system (ACH).

John Doe Jane Doe 123 Main St. Anytown, USA 12345	53289
Pay to the order of	\$DOLLARS
MemoSigned	
::12345m678: ::123456785678:	

# 7 Beneficiary Information (Due To Death)

If you need more space, please	e enclose a separate st	neet of paper.		
Primary				
NAME	RELATIONSHIP	CITY/STATE/ZIP	SOCIAL SECURITY NUMBER DATE OF BIRTH %	
A14445	DEL ATIONION III			
NAME	RELATIONSHIP	CITY/STATE/ZIP	SOCIAL SECURITY NUMBER DATE OF BIRTH %	$\neg$
NAME	RELATIONSHIP	CITY/STATE/ZIP	SOCIAL SECURITY NUMBER DATE OF BIRTH %	
Secondary				
NAME	RELATIONSHIP	CITY/STATE/ZIP	SOCIAL SECURITY NUMBER DATE OF BIRTH %	
NAME	RELATIONSHIP	CITY/STATE/ZIP	SOCIAL SECURITY NUMBER DATE OF BIRTH %	
NAME	RELATIONSHIP	CITY/STATE/ZIP	SOCIAL SECURITY NUMBER DATE OF BIRTH %	

#### 8 Signature

- ✓ I have read and understand the Disclosure Statement and Custodial Account Agreement. I adopt the Bridges Investment Fund Custodial Account Agreement, as it may be revised from time to time, and appoint the Custodian or its agent to perform those functions and appropriate administrative services specified. I have received and understand the prospectus for the Bridges Investment Fund (the "Fund"). I understand the Fund's objectives and policies and agree to be bound by the terms of the prospectus. Before I request an exchange, I will obtain the current prospectus for each Fund. I acknowledge and consent to the householding (i.e., consolidation of mailings) of regulatory documents such as prospectuses, shareholder reports, proxy statements, and other similar documents. I may contact the Fund to revoke my consent. I agree to notify the Fund of any errors or discrepancies within 45 days after the date of the statement confirming a transaction. The statement will be deemed to be correct, and the Fund and its transfer agent shall not be liable, if I fail to notify the Fund within such time period. I certify that I, as the Responsible Party, am of legal age and have the legal capacity to make this purchase.
- ✓ I understand that the fees relating to my account may be collected by redeeming sufficient shares. The Custodian may change the fee schedule at any time.
- ✓ I understand that my mutual fund account assets may be transferred to my state of residence if no activity occurs within my account during the inactivity period specified in my State's abandoned property laws.
- ✓ The Fund, its transfer agent, and any of their respective agents or affiliates will not be responsible for banking system delays beyond their control. By completing the banking sections of this application I authorize my bank to honor all entries to my bank account initiated through U.S. Bank, NA, on behalf of the applicable Fund. The Fund, its transfer agent, and any of their respective agents or affiliates will not be liable for acting upon instructions believed to be genuine and in accordance with the procedures described in the prospectus or the rules of the Automated Clearing House. When AIP or Telephone Purchase transactions are presented, sufficient funds must be in my account to pay them. I agree that my bank's treatment and rights to respect each entry shall be the same as if it were signed by me personally. I agree that if any such entries are not honored with good or sufficient cause, my bank shall be under no liability whatsoever. I further agree that any such authorization, unless previously terminated by my bank in writing, is to remain in effect until the Fund's transfer agent receives and has had reasonable amount of time to act upon a written notice of revocation.

X	
DEPOSITOR / LEGALLY RESPONSIBLE INDIVIDUAL'S SIGNATURE	DATE (MM/DD/YYYY)

Appointment as Custodian accepted:

U.S. BANK, NA

Joseph Newbyn

9	Deal	er	Info	rmai	tion
		O.	ш		31011

DEALER NAME	REPRESENTATIVE'S LAST NAME FIRST NAME M.I.
DEALER'S ID BRANCH ID	REPRESENTATIVE'S ID
DEALER HEAD OFFICE INFORMATION:	REPRESENTATIVE BRANCH OFFICE INFORMATION:
ADDRESS	ADDRESS CODE
CITY / STATE / ZIP	CITY / STATE / ZIP
TEI EPHONE NI IMBER	TELEPHONE NUMBER

### Before you mail, have you:

- ☐ Completed all USA PATRIOT Act required information?
  - Social Security or Tax ID Number in Section 1 & 2?
  - Birth Date in Section 1 & 2?
  - Full Name in Section 1 & 2?
  - Permanent street address in Section 1 & 2?

- ☐ Enclosed your check made payable to Bridges Investment Fund?
- ☐ Included a voided check, if applicable?
- ☐ Signed your application in Section 8?

For additional information please call toll-free 866-934-4700 or visit us on the web at www.bridgesfund.com.

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