



Use this form to add or change the bank account linked to your Lord Abbett account.

**FOR MUTUAL FUND, TRADITIONAL IRA, ROTH IRA, COVERDELL ESA, AND SEP IRA**

**Mail completed form to:** Lord Abbett Service Center, PO Box 219336, Kansas City, MO 64121-9336

**Overnight mail:** Lord Abbett Distributor LLC, 330 West 9th Street, Kansas City, MO 64105-1514

**Fax:** 816-843-7248 (Advisors are permitted to fax in paperwork provided the Medallion Signature Guarantee is legible. Shareholders are permitted to fax in paperwork provided a Medallion Signature Guarantee is not required.)

**Call Lord Abbett for assistance:** 888-522-2388 (Monday—Thursday between 8:30 a.m.–6:00 p.m. ET and Friday between 8:30 a.m.–4:00 p.m. ET)

**FOR SIMPLE IRA, SARSEP IRA, 457(b), AND 403(b)**

**Mail completed form to:** Lord Abbett Service Center, PO Box 219198, Kansas City, MO 64121-9198

**Overnight mail:** Lord Abbett Distributor LLC, 330 West 9th Street, Kansas City, MO 64105-1514

**Fax:** 816-218-0072 (Advisors are permitted to fax in paperwork provided the Medallion Signature Guarantee is legible. Shareholders are permitted to fax in paperwork provided a Medallion Signature Guarantee is not required.)

**Call Lord Abbett for assistance:** 888-223-0020 (Monday—Thursday between 8:30 a.m.–6:00 p.m. ET and Friday between 8:30 a.m.–4:00 p.m. ET)

**Note:** If one name on the bank account registration matches the registration of the Lord Abbett Mutual Fund account, no Medallion Signature Guarantee is required to establish the banking information.

**This form should not be used to set up a systematic purchase or redemption.**

- To set up a systematic purchase, please use the Systematic Purchase Form.
- To set up a Non-IRA systematic redemption, use the Systematic Distribution Form for Non-Retirement Accounts.
- To set up an IRA systematic redemption, use the IRA Systematic Distribution Form.

**STEP 1: ACCOUNT REGISTRATION INFORMATION**

Owner Name (First Name, MI, Last Name) OR Company Name

Social Security Number or Tax ID Number

Joint Owner Name (First Name, MI, Last Name) (if applicable)

Street Address

City

State

Zip Code

Email Address

Daytime Phone Number

Account or Plan Number

Delete all previous bank accounts  Update the existing systematic purchase/redemption on file

**STEP 2: BANK INFORMATION**

**New Bank Information**

Enter your new bank information (from your checking or savings account):

Bank account type:  Checking  Savings

Bank Name: \_\_\_\_\_

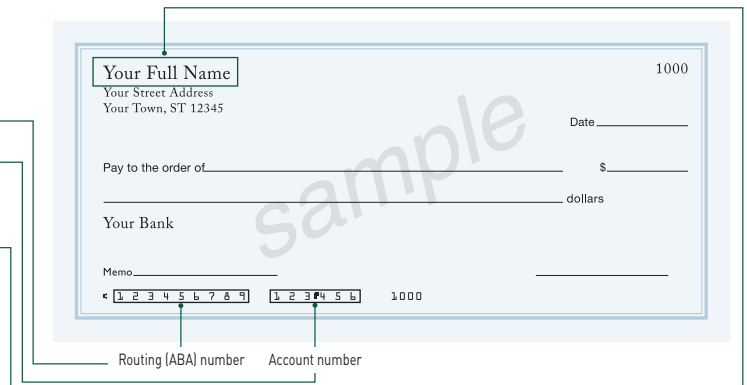
Nine-digit routing (ABA) number: \_\_\_\_\_

Bank account number: \_\_\_\_\_

Bank account registration name (include all registration names):  
\_\_\_\_\_  
\_\_\_\_\_

**Note:** A group retirement plan (SIMPLE IRA, SARSEP IRA, 457(b), and 403(b)) must also provide a copy of a voided check or deposit slip for bank account verification purposes; then a Medallion Signature Guarantee is no longer a requirement.

**Note:** If your banking instructions have changed, this form needs to have a Medallion Signature Guarantee to avoid a 15-day hold on redemptions.



**STEP 3: DIRECT DEPOSIT OF DISTRIBUTIONS & CAPITAL GAINS**

Please select the distribution(s) you would like deposited into the above bank account.

Dividends  Capital Gains

**STEP 4: AUTHORIZED SIGNATURE(S)**

This is authorization to add or change the bank account linked to the Lord Abbett account.

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Authorized Owner Signature (legal capacity, if needed; for example, trustee, executor, plan administrator, etc.) Date

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Authorized Joint Account Owner Signature (if applicable) Date

**STEP 5: MEDALLION SIGNATURE GUARANTEE (or Signature Guarantee) (if required)**

A Medallion Signature Guarantee is required on the Banking Authorization form if the bank account registration does not match at least one of the authorized signatures. When new banking instructions are added or previous ones changed, Lord Abbett places a 15-day hold on redemptions. Funds will be available immediately for redemption if this form has a Medallion Signature Guarantee.

Medallion Signature Guarantees must cover the amount of the requested transaction. There are several different guarantee amounts, so it is important to acquire a guarantee amount equal to or greater than the amount of the transaction(s).

To obtain a Medallion Signature Guarantee, sign this form in the presence of an authorized person at a broker/dealer firm or at another financial institution, such as a bank or trust company. A notarization from a notary public does not meet Medallion Signature Guarantee requirements.

**Please place Medallion Signature Guarantee here.**