

# IRA Payroll Direct Deposit Form



LORD ABBETT®

For assistance completing this form please call Lord Abbett: 888-522-2388 - Monday – Friday 8:00 AM ET to 5:30 PM ET

**COMPLETE THIS FORM AND FORWARD IT TO YOUR EMPLOYER'S PAYROLL DEPARTMENT TO ESTABLISH PAYROLL DIRECT DEPOSIT FOR ALL OR PART OF YOUR PAYCHECK TO YOUR LORD ABBETT ACCOUNT.**

Before completing this form, confirm with your payroll department that they offer this service through the Automated Clearing House (ACH) and if they require their own form to establish Payroll Direct Deposit.

## STEP 1: ACCOUNT REGISTRATION INFORMATION

Owner Name (First Name, MI, Last Name)

Mobile Number

Alternate Phone Number

Date of Birth

Street Address

City

State

Zip Code

Employee ID Number

## STEP 2: PAYROLL DEDUCTION AND DEPOSIT INSTRUCTIONS

You must have an existing Lord Abbett IRA Account to establish payroll deduction using this form. Fund numbers can be found on our investor website, [lordabbett.com](http://lordabbett.com), by selecting mutual funds, followed by tickers and fund numbers. All deposits will be treated as current year contributions based on the date your deposit is received by Lord Abbett.

BNY Mellon Bank Prefix	Lord Abbett Mutual Fund Account Number*	Lord Abbett Fund Number**	Per Pay Period Deposit Amount*** Enter the Dollar Amount or Percent of your pay.
892			
892			
892			
892			
892			

\*Must be 10 digits, if your account number is less than 10 digits add leading zeros. Example if your account number is 123456789 enter 0123456789.

\*\*Must be 4 digits, if your fund number is less than 4 digits add leading zeros. Example if your fund number is 123 enter 0123.

\*\*\*Please confirm with your employer the option(s) they support i.e., dollar amount, percent or either. Please clearly label each deposit amount (\$ or %).

## EMPLOYER INSTRUCTIONS FOR ACH PAYROLL DIRECT DEPOSIT TO LORD ABBETT IRA ACCOUNT(S) AND FUND(S) LISTED ABOVE:

- The deposit bank account type needs to be "Checking"
- BNY Mellon Bank – ABA Number: 011001234
- Bank Account Number for Payroll Direct Deposit: The account number for deposit must be 17-digits without any dashes or spaces. This includes a 3-digit prefix **"892"**; 10-digit *Lord Abbett account number*; and 4-digit *Lord Abbett fund number*. Example: For the Lord Abbett Account number 123456789 as this is 9 digits a leading zero must be inserted, the Lord Abbett fund is 123 as this is a three-digit number a leading zero must be inserted. The 17-digit Bank Account number would be **89201234567890123**.

## STEP 3: PAYROLL DEDUCTION AUTHORIZATION AND EMPLOYEE SIGNATURE

I hereby authorize my employer to automatically deduct from my paycheck the amount specified in section 2 of this form and transmit that amount to the account number indicated. Investments will be made at the then current Net Asset Value of the fund(s) indicated in section 2, including any applicable sales charge. I understand that all instructions under the Payroll Direct Deposit, including changes in the amount of the investment or cancellation, must be made directly with my employer. It is the sole responsibility of my employer to arrange for all transactions. If monies to which I am not entitled are transmitted by my employer to my Lord Abbett fund, I authorize my employer to redeem on my behalf shares in the amount necessary to obtain the return of the entire amount of these monies. I authorize the applicable fund and its transfer agent to follow all instructions by my employer in connection with transactions related to this request for Payroll Direct Deposit, including the redemption of shares, and I agree not to make claims against Lord Abbett, the custodian of my IRA, the transfer agent or fund distributor for following the instructions of my employer. The availability of funds in my account is subject to verification of the transfer. The terms of this Payroll Direct Deposit may be terminated or modified at any time and without notice. I understand and agree to these terms.

Account Owner's Signature

Date