



Use this form to establish an Automated Clearing House (ACH) privilege that allows you to transfer money directly between your Lord Abbett fund account(s) and your bank account by electronic funds transfer.

**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–Friday between 8:30 a.m. and 6:00 p.m. Eastern Time.)

- Note:**
- Purchase requests before 4 p.m. Eastern Time will receive that business day's price. Purchase requests after 4 p.m. will receive next business day's price.
  - Proceeds will usually be deposited/debited to your bank account within two business days after the receipt of your ACH purchase or redemption request, provided that the request is in good order.
  - The minimum on-demand ACH purchase or redemption amount is \$50; the maximum is \$100,000.
  - If name and/or address on this bank account is different from that appearing in the account registration, a signature guarantee is required.

**STEP 1: ACCOUNT REGISTRATION INFORMATION**

Owner Name (First Name, MI, Last Name)

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

Street Address City State Zip Code

Account Number Email Address Daytime Phone Number

**STEP 2: BANK INFORMATION (optional; required only if you're setting up new bank instructions)**

**New Bank Information**

Enter your bank information from your personal checking or savings account:

Bank account type:  Checking  Savings

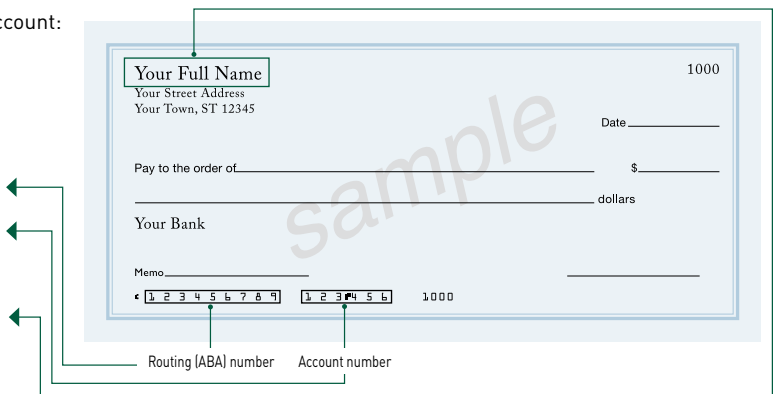
Bank name: \_\_\_\_\_

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

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

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

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



**STEP 3: SYSTEMATIC PURCHASE OPTIONS**

**Systematic Purchases (ACH) (When establishing an account with a systematic purchase, the minimum initial investment is \$50 per fund.)**

Please withdraw \$\_\_\_\_\_ (\$50 per fund minimum) from the bank account shown on the voided blank check or savings deposit slip and invest in the Lord Abbett \_\_\_\_\_ Fund.

**Please note:** Effective November 29, 2013, the Lord Abbett Diversified Income Strategy Fund changed its name to Lord Abbett Multi-Asset Income Fund, the Lord Abbett Balanced Strategy Fund changed its name to Lord Abbett Multi-Asset Balanced Opportunity Fund, the Lord Abbett Growth & Income Strategy Fund changed its name to Lord Abbett Multi-Asset Growth Fund, and the Lord Abbett Global Allocation Fund changed its name to Lord Abbett Multi-Asset Global Opportunity Fund.

**(If you have more than one fund, please provide information on a separate sheet of paper.)**

**Start Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
(MM/DD/YYYY)

**Frequency of Investments:**

- Twice a month (5th and 20th)       Monthly (day of month: \_\_\_\_\_)       Every other month       Quarterly

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

**All account owners must sign below.**

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

\_\_\_\_\_  
Authorized Signature (joint tenant[s])      \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Date

**STEP 5: MEDALLION SIGNATURE GUARANTEE (if required)**

A Medallion Signature Guarantee is required on the ACH Electronic Funds Transfer Form, if name and/or address on this bank account is/are different from that appearing in the account registration. 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. 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).

**Please place Medallion Signature Guarantee here.**