

EFT Link Application



ADHOC

Retirement

Bank Settlement

If you elect for this convenient service, we will automatically move money between your bank and brokerage account for authorized distributions or contributions.

To Add EFT Account Link to Your Brokerage Account

(Note: There must be a common name between your brokerage account and any other account listed.)

Name (print your name(s) exactly as it (they) appear(s) on your account statement):

Address: _____

Brokerage Services Account No.: _____

Print your bank information below. Please note: Your financial institution must be a member of the Automated Clearing House (ACH). Check with your bank if you are not sure.

Type of Account: Checking Savings

Bank Name: _____

Bank Routing/Transit & Merchant Number: _____

Bank Account Number: _____

Name on Account: _____

Bank Address: _____

I (we) hereby authorize National Financial Services (NFS) or Allegheny Investments (AI) to initiate credit or debit entries to my (our) account indicated in the bank name above representing authorized contributions or distributions. I (we) authorize and request the Bank to accept any such credit or debt entries initiated by NFS or AI. I (we) further agree that NFS or AI will not be liable for any loss, liability, cost or expense for acting upon this authorization.

It is understood that this authorization may be terminated by me (us) at any time by written notification received by both NFS/AI and the Bank. Any such notification shall be effective only with respect to entries initiated after receipt of such notification and a reasonable time to act on it.

Signature: _____

Signature of Joint Tenant, if any: _____

Signature of Guarantee (if required): _____