

Hartford Funds Automatic Investment Form

HARTFORDFUNDS

Our benchmark is the investor.®

Purpose

To initiate an automatic investment program from your bank.

A Medallion Signature Guarantee is required to add new bank account/credit union account information or change existing bank account/credit union account information on your Hartford Funds Account.

This form must be mailed to the address indicated on page 2.

Section A - Account Information

Owner Name	Telephone Number	Account Number	
Residential Address (P.O. Boxes not allowed)	City	State	ZIP Code

Section B- Automatic Investment Plans**Automatic Investing from a Bank Account or Credit Union**

Invest the following amount in the following fund(s). Please be sure your bank or credit union allows funds to be withdrawn by means of Automated Clearing House ("ACH") Network. Please also complete Section C if you have chosen this investment method.

Investment in a new fund requires a minimum investment of \$250 with a \$50 minimum recurring monthly investment. ACH purchase limit is \$100,000 per investor per day.

1. Initial investment in a new fund

Amount of initial investment \$ _____ (minimum \$250 per fund) Initial investment withdrawal date ____/____/____

2. Recurring investment (A minimum recurring monthly investment of \$50 per fund is required. If amount is left blank, we will default to \$50 per fund.)

- ☐ Monthly ☐ Bi-weekly (twice per month): withdraw funds on the ____ and ____ of each month (1st - 28th)
☐ Quarterly ☐ Semi-annually ☐ Annually

Amount of recurring investment \$ _____ Start date ____/____/____ (1st - 28th)

Notes: All investments will be considered current year contributions.

Investments will be made monthly on the day of the month specified (any day, 1st through 28th) as the starting date. If a date is not specified, this option will begin on the 15th of the month.

Make your fund selection in the table below. For a complete list of funds, please refer to **Fund List AC**, which is available on our website at Hartfordfunds.com

Fund Number	Dollar Amount	Percentage	Fund Number	Dollar Amount	Percentage
_____	\$ _____	OR _____%	_____	\$ _____	OR _____%
_____	\$ _____	OR _____%	_____	\$ _____	OR _____%
_____	\$ _____	OR _____%	_____	\$ _____	OR _____%
_____	\$ _____	OR _____%	_____	\$ _____	OR _____%
_____	\$ _____	OR _____%	TOTAL INVESTMENT:	\$ _____	OR _____%

Section C - Cost Basis Information for Non-Qualified Accounts

Internal Revenue Services (IRS) regulations require fund companies that produce 1099-B tax forms to include, among other things, cost basis reporting and holding period information for shares purchased on or after January 1, 2012.

If your transaction will add to an existing account, the cost basis method previously elected and on file will apply. If your transaction will add a new fund to an existing account and you have not previously informed us of an election method that can be applied to new funds, the default method of Average Cost (ACST) will be placed on the new fund. To elect a different cost basis method, complete the Cost Basis Method Election Form (MF-10087) and submit it with this form.

Hartford Funds cannot offer tax advice. You should consult with a qualified tax advisor to determine the method that makes the most sense for you, or if you have any other tax questions regarding your account.

Section D - Bank Account or Credit Union Information

Important: By signing this paperwork, you agree and confirm that your use of ACH will not result in transfers to or from a financial institution outside of the United States. You also understand it is your responsibility to notify Hartford Funds if any changes to your status occur that may require funds to be sent to or from a financial institution outside of the United States.

All owners of the bank account must sign this form.

Bank account type: ☐ Checking account (attach voided check)
☐ Savings account (attach deposit slip)

All owners of the Hartford Funds account and all owners of the bank/credit union account must sign this form.

If no common owner exists between the Hartford Funds account and the bank account, the guaranteed signature of at least one bank account owner is required in addition to the guaranteed signature of the Hartford Funds account owner.

A Medallion Signature Guarantee is required if this is a new or updated bank/credit union account on the Hartford Funds Account.

Name of Financial Institution			Phone Number
Mailing Address	City	State	Zip Code
Account Number	Account Type (check one) <input type="checkbox"/> Checking <input type="checkbox"/> Savings	Transit Routing Number (may be obtained from bank)	

John Q. Public
123 Main Street
Anywhere, ST 00000-0000

0000

Pay to the
order of

VOID

\$

Dollars

Any Bank
Any Town, ST 00000

MEMO

|:000000000:|

0000000000

XXXX

Bank Routing Number

Account Number

**Attach an original voided check here.
Please use tape instead of staples.**



- No faxed copies allowed.
- No Starter Checks.
- Minimum ACH is \$50 per fund per month.
- ACH will arrive in 2-3 business days.
- There is no fee for this option.

Section E - Authorization and Signature

Please sign and date the authorization below.

I (we) authorize Hartford Funds to initiate debit entries, credit entries and if necessary adjustments for any debit entries in error to my (our) account indicated above and the depository named above, herein after called DEPOSITORY, to debit and/or credit the same to such account. This authority is to remain in full force and effect until Hartford Funds has received written notification from me (or either of us) of its termination in such time and in such manner as to afford Hartford Funds and Depository a reasonable opportunity to act on it. I (we) should allow at least 30 days (from receipt of initial payment for new accounts) for the first withdrawal to occur and that deposits will be allocated to the funds within the above indicated Hartford Funds account according to the allocation instructions.

All owners of the Hartford Funds account and all owners of the bank/credit union account must sign this form. If Hartford Funds account owner and bank/credit union account owner are the same, only the Account Owner/Joint Account Owner (if applicable) boxes must be signed.

Account Owner Signature	Date	Medallion Signature Guarantee Stamp Here
Joint Account Owner's Signature	Date	Medallion Signature Guarantee Stamp Here
Bank/Credit Union Account Owner Signature	Date	Medallion Signature Guarantee Stamp Here
Joint Bank/Credit Union Account Owner's Signature	Date	Medallion Signature Guarantee Stamp Here

**For standard mail delivery,
please mail this form to:**

Hartford Funds
P.O. Box 219060
Kansas City, MO 64121-9060

**For private express mail,
please mail this form to:**

Hartford Funds
801 Pennsylvania Ave Suite 219060
Kansas City, MO 64105-1307