

# ADDITIONAL INVESTMENT FORM FOR MFS® NON-RETIREMENT ACCOUNTS



## 1. Account Information

ACCOUNT OWNER'S NAME \_\_\_\_\_

ACCOUNT OWNER'S PHONE NUMBER \_\_\_\_\_

-   -      
 ACCOUNT OWNER'S SOCIAL SECURITY NUMBER

MAILING ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_

This is my new address; please update my account information. (Please check the box and sign only if applicable.)

SHAREOWNER'S SIGNATURE \_\_\_\_\_

**Note:** If the new address is a non-U.S. address, you will be restricted from making additional purchases into this account and exchanges into and out of this account.

REGISTERED REPRESENTATIVE'S NAME \_\_\_\_\_

REGISTERED REPRESENTATIVE'S PHONE NUMBER \_\_\_\_\_

## 2. List Individual Investments

**Note:** Purchases can also be made directly from your checking/savings account online or by telephone. Please visit [mfs.com](http://mfs.com) or contact the MFS Service Center at 1-800-225-2606 to learn more about these services.

FUND NUMBER	ACCOUNT NUMBER	FUND NAME/SHARE CLASS (example: MIT Fund – A)	AMOUNT
<input type="text"/>	_____	_____	\$ _____
<input type="text"/>	_____	_____	\$ _____
<input type="text"/>	_____	_____	\$ _____
<input type="text"/>	_____	_____	\$ _____

**Total investment amount:** \$ \_\_\_\_\_

Please make your investment check payable to the **MFS Service Center** and mail to:

<b>Regular mail</b> MFS Service Center, Inc. P.O. Box 219341 Kansas City, MO 64121-9341	<b>Overnight mail</b> MFS Service Center, Inc. Suite 219341 430 W 7th Street Kansas City, MO 64105-1407
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### Important Notes:

- Minimum additional investment amount is \$50 per fund via check for non-retirement accounts.
- To establish a **new** fund within your existing type of account in **the same share class**, write the word "NEW" in the space provided for the account number.
  - The minimum initial investment amount is \$1,000 to establish a new account.
  - Please read the fund's prospectus and consult your financial professional with any questions before investing in a new MFS fund.
- Please use more than one form if you have more than four additional investments.
- If you are investing in a new share class, a new account application is required.
- Funds will be invested on the first business day of receipt as long as the investment instructions are completed in full.