

# Automatic Investment Plan Request

For more information, contact us toll-free at 800.820.0888 or fax 855.671.8280.

Visit our web site at [GuggenheimInvestments.com](http://GuggenheimInvestments.com).

Standard delivery: Guggenheim Investments, P.O. Box 534493, Pittsburgh, PA 15253-4493

Overnight delivery: Guggenheim Investments, Attention: 534493, 500 Ross Street, Pittsburgh, PA 15262

This form allows you to invest funds into your Guggenheim Investments account from your bank account via Automated Clearing House (ACH) on the date(s) you designate. The minimum investment is \$20 per fund.

## 1. ACCOUNT INFORMATION

New request    Change to existing information

\_\_\_\_\_  
Account Name

\_\_\_\_\_  
Account Number

\_\_\_\_\_  
Telephone Number

## 2. SET UP AUTOMATIC INVESTMENT PLAN

### A. Investment Frequency

*Please allow up to 15 days from receipt of form for service to be activated.*

Please process investment(s) on the following day(s) of the month: \_\_\_\_\_ (indicate 1–31)

*If date selected falls on a weekend or holiday, your request will be processed on the next business day. If a date and/or frequency is not indicated, your investment will take place monthly on the 1st.*

Investment(s) should take place:    Monthly    Quarterly (Mar, Jun, Sep, Dec, unless specified otherwise)    Semiannually (specify below)    Annually (specify below)  
 JAN    FEB    MAR    APR    MAY    JUN    JUL    AUG    SEP    OCT    NOV    DEC

### B. Investment Selection

Please invest funds into:

Fund Name	Dollar Amount (\$20 minimum per fund)
_____	_____
_____	_____
_____	_____
_____	_____

*If no fund selection is made, funds will be credited to Rydex U.S. Government Money Market. **Contributions to IRA accounts will be designated for the year in which they are received.** Contributions into SEP accounts will be coded as SEP Employer contributions unless otherwise indicated. Purchases into funds which price twice a day are eligible for the afternoon price only.*

**2. SET UP AUTOMATIC INVESTMENT PLAN (CONTINUED)**

**C. Bank Information**

Add new ACH/EFT instructions to my account. A Medallion signature guarantee is required to add new bank instructions. A voided check must accompany this request.

Use my **existing** bank instructions:

**We cannot establish ACH services using starter checks or checks for brokerage, cash management, credit card or mutual fund accounts.** Your bank must be a member of the Automated Clearing House (ACH) network.

Bank Name: \_\_\_\_\_

ABA Number: \_\_\_\_\_

Checking account     Savings account\*

Account Number: \_\_\_\_\_

Account Name: \_\_\_\_\_

A voided check is required to establish ACH. (Deposit slips may be used for savings accounts only.)\*

**ATTACH VOIDED CHECK HERE**

Your Name Somewhere, USA	No. _____
Pay to the order of _____ \$ _____	
_____ dollars	
VOID	
Your Bank Somewhere, USA	_____
000 0000 00000000 000000000	

\*For savings accounts: Please contact your bank to verify that the ABA number on the deposit slip is correct for ACH transactions. We may also contact you or other sources to verify the ABA number.

Guggenheim Investments may charge a \$25 fee if an ACH transaction is declined by your bank for any reason, and you will not be entitled to benefit from any increase in NAV that the Fund(s) may have experienced from the time of your order to the time of its cancellation. In addition, you may be responsible for any losses that the Funds incur as a result of your cancelled order.

**3. SIGNATURE AND AUTHORIZATION**

I authorize Guggenheim Investments to institute the automatic investment plan described on this form and to initiate debit/credit entries to my account at the financial institution indicated through the Automated Clearing House (ACH) system, subject to the rules of the financial institution, ACH, and Guggenheim Investments. I agree that Guggenheim Investments will not be held liable for any resulting loss or expense from acting on these instructions.

Owner's Signature	Date

Joint Owner's Signature <i>(if applicable)</i>	Date

**MEDALLION SIGNATURE GUARANTEE**  
(Only required if you provided new bank instructions.)

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A Medallion signature guarantee is required to add new bank instructions. A Medallion signature guarantee may be obtained at most banks, brokerage firms, or other financial institutions. There may be a nominal fee. A Medallion signature guarantee is different than having a signature notarized. **Notarized signatures will not be accepted.**