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# Investment Callback Election

**INSTRUCTIONS:** This election form contains important choices that will impact the processing of your investment directions. Please read the form in its entirety prior to making your election. By signing this form, you are affirming your election and consenting to all the terms and conditions contained in this form and reaffirming the terms and conditions set forth in your Account Adoption Agreement.

## SECTION 1 - Account Holder Information

Name:  Account Number:

## SECTION 2 - Terms and Conditions

It is the policy of Kingdom Trust to call you, the Account Holder, to verify and confirm any outbound movement of cash from your account when Kingdom Trust receives instructions requesting it send funds from your account. Kingdom Trust will call you at the telephone number it has on file for you. If Kingdom Trust cannot reach you, funds will not be sent until it can verbally confirm that the instructions are genuine and authorized by you.

Kingdom Trust gives you the ability to opt out of verbal confirmation calls. You can do so by checking the box in Section 3 below labeled **OPT OUT**. If you choose to opt out of the calls, Kingdom Trust will process any instructions it receives without calling to confirm the instructions are genuine and authorized by you.

Kingdom Trust also gives you the ability to designate a third party authorized by you to receive verification calls from Kingdom Trust. If you choose to designate a third party to receive those verification calls, you must provide that person's name and daytime phone number to Kingdom Trust. Should you elect to designate a third party, the third party will be called and you will not be called. You can elect to designate a third party by checking the box in Section 3 below labeled **THIRD PARTY**.

If you elect to opt out of verification calls or designate a third party to receive the verification calls, Kingdom Trust will call to verify your election upon receipt of this Investment Callback Election form properly completed and signed by you. Thereafter, if you opt out of the calls, Kingdom Trust will process instructions without calling to verify those instructions. If you have designated a third party to receive verification calls, Kingdom Trust will place those calls to the designated third party at the number listed on this form for such third party and will call the third party to verify any outbound money movement until such time as you change your election.

If you do not make an election in Section 3 below or check the box labeled **PLEASE CALL**, Kingdom Trust will call to verify the instructions it receives.

## SECTION 3 - Callback Election

- OPT OUT** - Please do not call to verify instructions.
- THIRD PARTY** - Please call  at this number:
- PLEASE CALL** - Please call me to verify instructions at the number on file.

## SECTION 4 - Signature

Account Holder Signature:   Date:

Account Holder Printed Name:

*Kingdom Trust does not provide tax, legal or investment advice. It does not endorse or recommend any agent, company or specific investment. Any information communicated by Kingdom Trust is solely for educational purposes and should not be construed as tax, legal or investment advice. Consultations with tax, legal and investment professionals is advised prior to making any decisions regarding your account.*

