

# MFS FAX EXCHANGE FORM



## Instructions

- Please do not use this form if you are trying to reallocate your portfolio, and do not use percentages. Requests with percentages will be rejected.
- Include the fund and account number for both the "From" and "To" portions of the exchange.
- Please check the "New" box if the exchange is into an account that has not yet been established.
- Shares otherwise subject to a CDSC will not be charged a CDSC in an exchange. Shares will retain the CDSC schedule in effect based upon a pro rata share of the CDSC from the exchanged fund and the original purchase date of the shares subject to the CDSC.
- Fax completed form to MFS before 4 p.m. EST or market close at (877) 654-3203. Instructions received after market close will receive the following business day's trade date.

## 1. Account Registration

ACCOUNT REGISTRATION

ACCOUNT REGISTRATION

-   -

SOCIAL SECURITY NUMBER

DAYTIME PHONE NUMBER

NAME OF REGISTERED REPRESENTATIVE

FIRM NAME

REGISTERED REPRESENTATIVE'S PHONE NUMBER

## 2. Exchange Information

FROM	TO	CHECK IF EXCHANGING TO NEW ACCOUNT	AMOUNT	DOLLARS OR SHARES	
_____	_____	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
FUND/ACCOUNT NUMBER	FUND/ACCOUNT NUMBER				
_____	_____	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
FUND/ACCOUNT NUMBER	FUND/ACCOUNT NUMBER				
_____	_____	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
FUND/ACCOUNT NUMBER	FUND/ACCOUNT NUMBER				
_____	_____	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
FUND/ACCOUNT NUMBER	FUND/ACCOUNT NUMBER				
_____	_____	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
FUND/ACCOUNT NUMBER	FUND/ACCOUNT NUMBER				
_____	_____	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
FUND/ACCOUNT NUMBER	FUND/ACCOUNT NUMBER				
_____	_____	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
FUND/ACCOUNT NUMBER	FUND/ACCOUNT NUMBER				

## 2. Exchange Information (continued)

FROM	TO	CHECK IF EXCHANGING TO NEW ACCOUNT	AMOUNT	DOLLARS OR SHARES	
_____ FUND/ACCOUNT NUMBER	_____ FUND/ACCOUNT NUMBER	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
_____ FUND/ACCOUNT NUMBER	_____ FUND/ACCOUNT NUMBER	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
_____ FUND/ACCOUNT NUMBER	_____ FUND/ACCOUNT NUMBER	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
_____ FUND/ACCOUNT NUMBER	_____ FUND/ACCOUNT NUMBER	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
_____ FUND/ACCOUNT NUMBER	_____ FUND/ACCOUNT NUMBER	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>
_____ FUND/ACCOUNT NUMBER	_____ FUND/ACCOUNT NUMBER	<input type="checkbox"/>	_____	<input type="radio"/>	<input type="radio"/>

## 3. Signature

\_\_\_\_\_  
AUTHORIZED SIGNATURE

\_\_\_\_\_  
DATE (MM/DD/YYYY)

\_\_\_\_\_  
PRINT NAME

If you have any questions about this form, please call 1-800-225-2606 any business day.

Fax completed form to (877) 654-3203.