

Edward Jones Trust Company Managing Agency Account
Authorization and Agreement Form (Individual and joint accounts)

Account Holder information

Account Holder name(s) Address
Account Holder name(s) City, State, ZIP Code
Email address (optional)

I would like to use Online Access. (Email and mobile phone are required to set up Online Access.)

Email address: Mobile number:

Account authorization

By my/our signature(s) below, I/we have received, read, and understand the Edward Jones Trust Company Managing Agency Account Agreement and agree to its terms, and I/we have received the document titled Edward Jones Trust Company Disclosures and Fee Schedule. I understand and acknowledge that a minimum one-year fee based upon the published fee schedule or negotiated fee schedule may apply to this account.

Joint accounts only

All owners must execute this Managing Agency Account Authorization and Agreement Form. Joint owners must select one form of ownership. If you have questions regarding which form of ownership is appropriate for you, please contact your attorney. Edward Jones Trust Company will not, nor is any employee authorized to, advise you with this choice.

- Joint tenancy WROS (Not available in LA)
Tenants in common
Tenants by the entireties
Community property (Community Property States only)
Community property WROS (AK, AZ, CA, ID and NV only)
Marital property (WI only)
Survivorship marital property (WI only)

W-9 certification

Under penalties of perjury, I certify that: (1) the number displayed below is my correct Taxpayer Identification Number (or I am waiting for a number to be issued to me); and (2) I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and (3) I am a U.S. person (including a U.S. resident alien); and (4) the FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.* Please note: If the IRS notified you that you are subject to backup withholding because of under-reporting (and notice has not been terminated by the IRS), please cross out statement (2) above.

Social Security Number / Taxpayer identification number

Print individual's name

*FATCA codes are only applicable to accounts maintained outside the U.S.

The IRS does not require your consent to any provision of this document other than the certifications to avoid backup withholding.

THE EDWARD JONES TRUST COMPANY MANAGING AGENCY ACCOUNT AGREEMENT CONTAINS, ON PAGE 5 IN SECTION V, A BINDING ARBITRATION PROVISION WHICH MAY BE ENFORCED BY THE PARTIES.

Signature of Account Holder(s) Date

Social Security Number Date of Birth

Signature of Account Holder(s) Date

Social Security Number Date of Birth

Signature of EJTC Name/Title