



Invesco Trusted Contact Form

Use this form to add a trusted contact to your new or existing Invesco account(s) or remove a trusted contact from your existing Invesco account(s).

Important information regarding trusted contact: Designating a trusted contact is not required and does not authorize the named individual to transact on or make changes to the account owner's account, but it does authorize Invesco Investment Services, Inc. (IIS) to communicate with the trusted contact regarding the account. There can only be one trusted contact per account.

**Required*

PLEASE USE BLUE OR BLACK INK

PLEASE PRINT CLEARLY IN BLOCK CAPITAL LETTERS

1 | Invesco Account Number and Registration Information

☐ SSN* or ☐ TIN*

Invesco Account Number or Plan ID

Account Registration (Please print name(s) as it appears on account.)

2 | Contact Preference

In some cases, Invesco will attempt to contact you for more information or to resolve any discrepancies that may be present with your request. The preferred method you provide below will be used for this request only and will not be added to your account for future contact.

Please provide your preferred method of contact (Select one.)

☐ Please contact my financial professional on record.

☐ Please contact me at - -

3 | Trusted Contact Information

By providing the information in this section, I authorize IIS to contact the person listed below and to disclose information about me in the following circumstances: to prevent the presumption of abandonment, to address possible financial exploitation, to confirm the specifics of my current contact information, health status, or the identity of any legal guardian, executor, trustee, or holder of a power of attorney or as otherwise permitted by federal or state law. Any information provided in this section will replace the information currently on file.

Note: Your trusted contact should not be a joint account owner or the financial professional on record.

Please select one.

☐ Add the following individual as trusted contact to the account referenced in section 1 only.

☐ Add the following individual as trusted contact to all accounts currently under the primary owner's social security number referenced in section 1.

Full Name of Trusted Contact*

Social Security Number

 - -

Date of Birth (mm/dd/yyyy)

Important: Trusted Contact must be age 18 years or older.

 / /

Mailing Address* (Required) (Including apartment or P.O. Box number.)

City*

State*

ZIP*

Trusted Contact Information section continues on the next page.

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Foreign Routing or Postal Code

Country of Residence if outside the U.S.

Primary Phone Number

 - -

Email Address

Relationship to Account Owner

4 | Removal of Trusted Contact

Full Name of Trusted Contact*

5 | Authorization and Signature(s) (All registered owners must sign and date below)

By signing this form, I authorize and direct IIS to maintain the account(s) referenced above in accordance with the instructions set forth above.

Signature*

Date (mm/dd/yyyy)

 / /

Title

Signature

Date (mm/dd/yyyy)

 / /

Title

6 | Mailing Instructions

Please send completed and signed form to:

(Direct Mail)

Invesco Investment Services, Inc.
P.O. Box 219078
Kansas City, MO 64121-9078

(Overnight Mail)

Invesco Investment Services, Inc.
801 Pennsylvania Ave
Suite 219078
Kansas City, MO 64105-1307

For assistance please contact an Invesco Client Services representative at 800 959 4246, weekdays, 7 a.m. to 6 p.m. Central Time.

Visit our website at invesco.com/us to:

- Check your account balance
- Confirm transaction history
- View account statements and tax forms
- Sign up for eDelivery of statements, daily transaction statements, tax forms, prospectuses, and reports
- Check the current fund price, yield and total return on any fund
- Process transactions
- Retrieve account forms and investor education materials

Call the 24-Hour Automated Investor Line 800 246 5463 to:

- Obtain fund prices
- Confirm your last three transactions
- Order a recent account statement(s)
- Check your account balance
- Process transactions

To use the system, please have your account numbers and Social Security number available.