

## 1. How can my entity become an Investor in PLGIT?

- Review the PLGIT Information Statement and Declaration of Trust.
- Complete and send the following forms/documents to your PLGIT Representative.

***New Investor Application***

***IRS Form W-9***

***Resolution***

Please **fax** form(s) to: 1-800-252-9551

Or **mail** form(s) to: PLGIT Client Services Group  
P.O. Box 11760  
Harrisburg, PA 17108-1760

- Completed forms/documents must be reviewed by your PLGIT Representative, accepted by PLGIT and have the Representative's signed authorization before your account can be opened.

## 2. How does my entity open an additional account in PLGIT?

- Complete and send the following forms/documents to your PLGIT Representative.

***Account Application***

***Contact Record (New Contacts Only)***

***Permissions***

Please **fax** form(s) to: 1-800-252-9551

Or **mail** form(s) to: PLGIT Client Services Group  
P.O. Box 11760  
Harrisburg, PA 17108-1760

- Completed forms/documents must be reviewed by your PLGIT Representative, accepted by PLGIT and have the Representative's signed authorization before your account can be opened.

## 3. How does my entity open an account in PLGIT if the account will be controlled by a trustee or other fiduciary?

- Complete or, as applicable, have the trustee complete and send the following forms/documents to your PLGIT Representative.

***Trusteed Account Application***

***Contact Record (New Contacts Only)***

***Permissions***

***Trustee Verification - Schedule B***

***Trust Document (A copy of the first page)***

Please **fax** form(s) to: 1-800-252-9551

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- Completed forms/documents must be reviewed by your PLGIT Representative, accepted by PLGIT and have the Representative's signed authorization before your account can be opened.

## 4. How do I sign up individuals for PLGIT's Connect and gain access to our account(s) online?

- Complete and send the following form to PLGIT's Client Services Group.

***Contact Record (New Connect Users Only)***

***Permissions***

Please **fax** form to: 1-800-252-9551

## 5. Where can I send audit confirmation?

- Forward all audit confirmations to the PLGIT's Client Services Group.

Please **fax** confirmation to: 1-800-252-9551

Or **mail** confirmation to: PLGIT Client Services Group  
P.O. Box 11760  
Harrisburg, PA 17108-1760

## 6. How do I add or remove ACH/Wire instructions to/from our account(s)?

- Complete and send the following form(s) to the PLGIT Client Services Group.

### ***ACH Setup Instructions***

### ***Wire Setup Instructions***

Please **fax** form(s) to: 1-800-252-9551

## 7. How do I add/change/remove statement recipients?

- Complete and send the following form to the PLGIT Client Services Group.

### ***Permissions***

Please **fax** form to: 1-800-252-9551

## 8. How do I update the people who are authorized on our account(s)?

- Complete and send the following form to the PLGIT Client Services Group.

### ***Permissions***

Please **fax** form to: 1-800-252-9551

## 9. How do I stop receiving paper statements and begin receiving E-Statements?

- You may select the Electronic Statement Delivery and/or the Electronic Confirm Delivery options under the Tools/Forms section of Connect. When you select to receive statements and/or confirmations electronically, you will receive an email notification of the monthly statement's or daily confirmation's availability on Connect. If Electronic Delivery is selected, no paper versions will be mailed. The statements and confirmations available on Connect are exactly the same as paper versions that would be mailed to recipients.

## 10. How do I find rate information?

- The Current Seven Day Yield can be found on the website [www.plgit.com](http://www.plgit.com) under the Current Rate link. The Monthly Distribution Yield can be found on your monthly statement. The Current Yield, as of the last day of a month, can also be found on your monthly statement. Please contact the PLGIT Client Services Group at 1-800-572-1472 if you have any questions.

## 11. How do I contact my PLGIT Representative?

- Call the Client Services Group at 1-800-572-1472, option 2 and they will connect you with your PLGIT Representative.

## 12. What time is the Client Services Group open to receive calls?

- A Client Services Group member is available to answer your phone call from 8:30 A.M. Eastern Time to 5:00 P.M. Eastern Time, Monday through Friday on every Trust business day.

## 13. What is the notification cutoff time for transaction requests?

- The notification cutoff time depends on the transaction type.

<b>Wire (Same-Day)</b>	2:00 P.M. Eastern Time	<b>Transfers (Same-Day)</b>	4:00 P.M. Eastern Time
<b>ACH (Next-Day)</b>	4:00 P.M. Eastern Time	<b>Exchanges (Same-Day)</b>	2:00 P.M. Eastern Time

## 14. What is the difference between an ACH and a wire?

- A wire is a same-day method of moving immediately-available funds and supporting information between two financial institutions through the Federal Reserve Wire Network system (Fed Wire). Wires are comparatively expensive to use.
- An ACH is a method of moving funds and supporting information by batches among financial institutions using the Automated Clearing House (ACH) system. Transaction requests received by the originating bank are collected and processed in batches, usually overnight. Funds are generally available to a beneficiary the business day after the originating financial institution processes the ACH transaction. ACH transactions are much less expensive than wires, sometimes only a few cents versus a few dollars for a wire.

## 15. Are the banking instructions different for an ACH and a wire?

- The banking instructions may be different depending on whether the transaction is an ACH or a wire. Please verify with the bank in question to ensure the proper instructions are on file with PLGIT's Client Services Group.