



Questions? Call 1-800-572-1472

Trustee Verification

Schedule A

Instructions: This document should be completed in addition to the **PLGIT Trusteed Account Application** when a Trustee is opening a Trustee-held Account for the benefit of an Investor. Please have all three interested parties sign and date this document. Once completed, submit this form through Connect, or fax or mail this form to the fax number or address at the bottom of this page.

PLGIT Account #: _____

(Trust Use Only)

SCHEDULE A DETAIL: (Please read, complete, sign and date this section.)

A Trustee-held Account should be opened in PLGIT. The undersigned hereby acknowledge:

- The Account is for the benefit of the following Investor: _____
(Enter the name of the PLGIT Investor.)
- The undersigned reviewed, and are familiar with, the relevant trust document. A copy of the first page of the trust document is attached.
- Based on our review of the trust document, we have determined or confirmed that:
 - The Fiduciary, Trustee, or Fiscal Agent which has been appointed under the trust document is: _____
(Fiduciary, Trustee or Fiscal Agent.)
 - PLGIT is an authorized investment under the trust document, and the Trustee is authorized to open the Account in the Trust and to invest in the Trust.
- The Account will be opened and held in the name of the Trustee for the benefit of the Investor, and the Trustee will be authorized, among other things, to give the Trust direction with respect to opening and closing the Account, requesting changes to Account information and initiating the purchase and redemption of PLGIT shares.

Investor Authorized Signatory

Title

Signature

Date

Trustee, Fiduciary, or Fiscal Agent

Title

Signature

Date

TRUST USE ONLY:

PLGIT Representative

Title

Signature

Date

REQUIRED DOCUMENTATION: (Please include the following **required** documents with this Schedule A.)

- New Investor Application
(ONLY FOR NEW INVESTORS)
- Trusteed Account Application
- Trust Document (A copy of the first page)
- Contact Record (New Contacts Only)
- Permissions

Any document containing sensitive information received by email will not be accepted. Please send by uploading through Connect, fax, or mail.

SEND VIA CONNECT: Log in to Account Access
Existing Connect Click ☒ Secure Contact
Users Only Select file to upload - Send message

FAX TO: PLGIT Client Services Group
1-800-252-9551

MAIL TO: PLGIT Client Services Group
P.O. Box 11760
Harrisburg, PA 17108-1760

TRUST USE ONLY

V2022.05	INITIALS
Processed	
Confirmed	