



# Systematic Withdrawal Plan Application

For Non-Retirement Accounts Only

You can now complete this request online. Visit [thornburg.com](http://thornburg.com)

Mail form to: Thornburg, PO Box 219017, Kansas City, MO 64121

## 1. Account Information

Name

Social Security Number

Date of Birth

Fund(s)/Account Number

Address

Phone

City

State

Zip

Alternate Phone

Email Address

Please check here if you are changing your address of record. If you mark this box, your signature(s) must be Medallion Guaranteed in section 6.)

## 2. Systematic Withdrawal Plan

I wish to automatically withdraw (minimum of \$50 per fund):

\$ \_\_\_\_\_ from fund/account \_\_\_\_\_

\$ \_\_\_\_\_ from fund/account \_\_\_\_\_

\$ \_\_\_\_\_ from fund/account \_\_\_\_\_

## 3. Frequency

Monthly       Quarterly       Semiannually       Annually       Other \_\_\_\_\_

If proceeds are being sent via check, the plan will automatically be set to the 1st of the month. Please indicate the month in which you would like the withdrawals to begin:

If proceeds are being sent to a bank account, you may designate a specific day of the month (if no date is indicated we will default to the 1st of the month):

#### 4. Cost Basis Election Method

Complete this section only if this redemption should be processed with a different cost basis election than the method currently established on your account. (Please note, the Fund will report cost basis to the IRS on covered shares purchased on or after January 1, 2012. Uncovered shares will be redeemed first.)

- ACST (Average Cost)       FIFO (First In First Out)       LIFO (Last In First Out)       SLID (Specific Lot Identification)
- HIFO (High Cost First Out)       LOFO (Low Cost First Out)       LGUT (Loss/Gain Utilization)

Please note, if SLID (Specific Lot Identification) is the cost basis method currently established on your account, we will default to your secondary method. If you have not chosen a secondary method, we will default to FIFO (First In First Out).

#### 5. Payment Instructions

- Mail check to address of record
- Send proceeds to banking account on file via ACH
- Send proceeds to the following banking information. Please attach a voided check. (If you do not attach a voided check, your signature(s) must be Medallion Guaranteed in Section 6.)

\_\_\_\_\_  
Name on Account

\_\_\_\_\_  
Bank Account Number

\_\_\_\_\_  
Routing Number

- Send proceeds to Special Payee/Address (if you choose this option your signature must be Medallion Guaranteed in section 6)

- Special Instructions:

#### 6. Signature (all shareholders listed on account must sign)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

#### 7. Medallion Signature Guarantee

You must complete this section if a voided check is not attached or if the Special Payee option was selected. There will be a 15 day waiting period before we can redeem to new banking instructions, unless this form has a Medallion Signature Guarantee Stamp.

A Medallion Signature Guarantee may be executed by any eligible guarantor: Commercial Banks, Trust Companies, Registered Broker Dealers. A Notary Public is NOT an eligible guarantor.

Note: Per the prospectus, the minimum withdrawal amount is \$50.00. The contingent deferred sales charge (CDSC) imposed on redemptions of Class C shares within one year of purchase is waived for redemptions under a systematic withdrawal plan within one year of purchase up to 10% of the account value as of the date you set up the plan, provided the account value is at least \$10,000 at the time the withdrawal plan is established.

Affix Guarantee Here