

## Duplicate Statement and Year End Tax Form Request

Use this form to request duplicate copies of your prior year-end statements and tax forms. If year-end statements are not available for the time period you request, a historical transcript will be provided. Before submitting a request, please note that our prior year-end statements and most recent years' tax forms are available for free by accessing your account on [columbiathreadneedleus.com/investor](http://columbiathreadneedleus.com/investor).

### Part 1 Investor Information (Please type or print clearly.)

Account Owner or UGMA/UTMA Minor (First, Middle Initial, Last)		Date of Birth (MM/DD/YYYY)	Social Security Number	
<input type="text"/>		<input type="text"/>	<input type="text"/>	
Co-Account Owner or UGMA/UTMA Custodian		Date of Birth (MM/DD/YYYY)	Social Security Number	
<input type="text"/>		<input type="text"/>	<input type="text"/>	
Name of Trust or Entity, if applicable		Trust Date (MM/DD/YYYY), if applicable	Taxpayer Identification Number	
<input type="text"/>		<input type="text"/>	<input type="text"/>	
Street Address or APO/FPO		City	State	ZIP Code
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
Mobile Phone Number		Home Phone Number		
<input type="text"/>		<input type="text"/>		
Fund/Account Number(s)			Date Opened (if known)	
<input type="text"/>			<input type="text"/>	

### Part 2 Records Being Requested

☐ Year-end Statements
 ☐ Tax Form(s) (only 7 years available)
 ☐ Years Needed

☐ Please check if you are requesting documents for original accounts, including funds which may have been merged or transferred to the account above (i.e. all history on the referenced account).

### Part 3 Records Retrieval Fees

Recent records can be obtained online by registering for account access on [columbiathreadneedleus.com/investor](http://columbiathreadneedleus.com/investor); otherwise fees will be assessed as outlined below:

- All prior year-end statement requests for the past 6 years and tax documents for the past 7 years are provided free of charge.
- \$50 fee for year-end statement requests older than 6 years. Please enclose a check payable to **Columbia Management Investment Services Corp.**

### Part 4 Instructions for Sending Records

A Medallion Signature Guarantee or Signature Validation Program Stamp may be required, based on the option you choose below. See Section 6 for additional details.

☐ Send the documents to my address of record (the address listed on my Columbia Threadneedle Investments account)

☐ Send the documents to me, at the address below (if your address has changed) *A Medallion Signature Guarantee or Signature Validation Program Stamp is required.*

☐ Send the documents to a third party, whose address is listed below. *A Medallion Signature Guarantee or Signature Validation Program Stamp is required.*

Name

Address

City  State  ZIP Code

For assistance completing this form, please contact a representative at 800.345.6611, Monday through Friday, 8:00 a.m. to 7:00 p.m. Eastern time.

## Part 5 Signature/Authorization

By requesting these documents, I agree that neither Columbia Management Investment Services Corp. (CMIS) and its affiliates nor any of their respective agents will be liable for any loss, injury, damage or expense as a result of acting upon any of my instructions. I agree to hold CMIS and their respective agents harmless for any loss, claims or liability arising from its or their compliance with these instructions.

If signing in capacity, you must be listed as an authorized individual on the account. If you are not the account owner or financial advisor but have authority to act on the listed account, or if the documents are being mailed to somewhere other than the address of record, additional documentation or a Medallion Signature Guarantee or Signature Validation Program Stamp may be required. See Section 6 for more information about Medallion Signature Guarantees and Signature Validation Program Stamps.

**Each person signing on behalf of an entity represents that his/her actions are authorized.**

Print Name of Account Owner or Authorized Individual

Capacity (if applicable)

Date

Print Name of Account Owner or Authorized Individual

Capacity (if applicable)

Date

Signature of Account Owner or Authorized Individual

X

Signature of Account Owner or Authorized Individual

X

**Medallion Signature Guarantee or Signature Validation Program Stamp**

Guarantor, please do not affix the guarantee unless all of the information on this page has been completed.

**Medallion Signature Guarantee or Signature Validation Program Stamp**

Guarantor, please do not affix the guarantee unless all of the information on this page has been completed.

## Part 6 Medallion Signature Guarantee & Signature Validation Program

The signatures of all account owners must be guaranteed by a Medallion Signature Guarantee (MSG) or Signature Validation Program (SVP) Stamp. A MSG or SVP Stamp may be executed by any eligible institution, including, but not limited to, the following: banks, credit unions, savings associations, brokers or dealers. An eligible guarantor institution providing an MSG must participate in one of the three Medallion Signature Guarantee programs recognized by the Securities and Exchange Commission. These Medallion Signature Guarantee programs include the Securities Transfer Agents Medallion Program (STAMP), the Stock Exchanges Medallion Program (SEMP) and the New York Stock Exchange Medallion Signature Program (MSP). A MSG or SVP stamp helps assure that a signature is genuine and not a forgery. Notarization by a notary public is not an acceptable signature guarantee or signature validation. The Transfer Agent reserves the right to reject a signature guarantee or signature validation and to request additional documentation for any transaction.

## Part 7 Return Instructions

Regular mail Columbia Management Investment Services Corp.  
P.O. Box 219104  
Kansas City, MO 64121-9104

Overnight mail Columbia Management Investment Services Corp.  
c/o SS&C GIDS, Inc.  
430 W 7th Street, STE 219104  
Kansas City, MO 64105-1407

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Columbia Threadneedle Investments (Columbia Threadneedle) is the global brand name of the Columbia and Threadneedle group of companies. Columbia Management Investment Services Corp. is the transfer agent for Columbia Funds.