



Wisconsin Investment Series Cooperative ®

How to Open an Account with WISC

TO ESTABLISH MEMBERSHIP AND OPEN A MASTER FUND ACCOUNT

- ❖ Your entity should review the Fund's Information Statement and Intergovernmental Cooperation Agreement, and then pass the enclosed Resolution to participate in the Fund. Then, complete the Master Account Application in its entirety and submit it to us along with the original signed Resolution. You may fax this documentation to PMA Financial Network at 630.718-8701 in order to expedite the membership process; however, the original signed documentation must also be mailed to us before any Fund redemptions will be honored. . (To open multiple Fund accounts under the same entity name, see "Optional Services".)
- ❖ You will be notified of your membership status by phone and fax within 3 business days of the date your complete documentation is received. A "Welcome Packet" will also be mailed out to you.

OPTIONAL SERVICES

❖ **PMAGPS INTERNET SERVICE AUTHORIZATION**

Complete this form for online access to your Fund account(s). Login information for each user will be sent to the user's email address as indicated on the form, within two business days. Please keep in mind that for security purposes we are unable to establish a PMAGPS login until the original signed Master Account Application is on file. (If you do not elect this option now, you may do so at any time in the future.)

❖ **PMA FINANCIAL NETWORK, INC. & PMA SECURITIES, INC. BROKERAGE ACCOUNT**

If your entity wishes to purchase Fixed Income Securities (Certificates of Deposits or other "Permitted" Fixed Income Investments), read the enclosed "Master Account Agreement" and complete sections 5B and 6 of the Master Account Application. Brokerage services utilize the same account number as your Fund account and are available through any and all sub-accounts you may open under your entity name.

❖ **CHECKWRITING**

If you would like check-writing privileges on any of your Fund accounts, mark the appropriate section under "Fund Redemption Options" on the Master Account Application and complete the Fund signature card. We provide 300 manual business checks at no charge. If you would like to order your own computerized, laser, or special order checks, the check specifications will be faxed to you. You can then provide these to your check printer or software administrator to have your own checks printed at your expense.

❖ **ADDITIONAL ACCOUNT AUTHORIZATION**

Complete this form now or at any time after the establishment of your master account to open additional, separate account(s) under your entity name. Please complete one form for each additional account. You may request check-writing privileges on additional accounts as well; simply complete a separate signature card.

❖ **UPDATE OF AUTHORIZED PERSONNEL**

Complete this form at any time after the establishment of your master account to change the authorized personnel listed in the Master Account Application. (This change will apply to all current and future accounts under your entity name, unless otherwise indicated).

*For more information, please contact your local representative or call PMA Financial Network, Inc. at
630.657.6400 or Toll-Free: 1.800.783.4273*

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