

Institutional Trading Website Registration and Change Form

June 2022

Use this form to authorize, change, or deactivate user access to your firm's account information on the Vanguard Institutional Trading Website.

Note: This form must be signed by an authorized signer or signer(s) as identified in an Organization Resolution on file with Vanguard or in a copy of your firm's Corporate Resolution dated within six months of this request.

Questions?

Institutional Investment Services:
800-950-0053

Intermediary Services:
800-669-0498

To authorize first-time access to your firm's plans, complete:

- Section 1. Firm information
- Section 2. First-time registration
- Section 4. Authorization and signatures

To add, change, or remove access to your firm's plans, complete:

- Section 1. Firm information
- Section 3. Add, change, or remove access or users
- Section 4. Authorization and signatures

1. Firm information

Provide your firm's >
full legal name.

*Name of firm	
*Firm's TIN	
Street address or P.O. box	
Street address <i>line 2</i>	
*City, State, Zip	
Contact name <i>first, middle initial, last</i>	
*Contact email address	
*Contact phone <i>area code, number, extension</i>	*Contact fax <i>area code, number, extension</i>

*Required information.

Return ALL pages of this form, even if some sections are left blank.

Important information regarding plan numbers.

Access to your account information on the Vanguard Institutional Trading Website is driven by a plan number. A plan number is a five-digit (alphanumeric) identifier assigned by Vanguard to group your accounts. Access to your firm's account information is provided at the plan level and extends to all accounts under that plan. If you need to confirm your plan number(s), contact us.

2. First-time registration

Complete this section to establish online access to your plans.

Note: Specify whether each user may access only certain plans or all plans for your firm and at what level ("view only" or "view and transact"). If you don't designate a level, access will default to "view only."

User 1

<i>*Name first, middle initial, last</i>		
<i>*Phone area code, number, extension</i>		<i>*Email address</i>
<i>Plans this user may access</i>	<i>Level of access for this user</i>	
	<i>View only</i>	<i>View and transact</i>
<i>All plans for this firm Specify level of access at right.</i>		
<i>Only the following plans Specify level of access at right.</i>		
<i>Plan number</i>		
<i>Plan number</i>		
<i>Plan number</i>		

*Required information.

Return ALL pages of this form, even if some sections are left blank.

User 2

<i>*Name first, middle initial, last</i>		
<i>*Phone area code, number, extension</i>	<i>*Email address</i>	
<i>Plans this user may access</i>	<i>Level of access for this user</i>	
	<i>View only</i>	<i>View and transact</i>
<i>All plans for this firm Specify level of access at right.</i>		
<i>Only the following plans Specify level of access at right.</i>		
<i>Plan number</i>		
<i>Plan number</i>		
<i>Plan number</i>		

**Required information.*

To add more than four users, provide the information on a separate sheet.

Return ALL pages of this form, even if some sections are left blank.

User 3

<i>*Name first, middle initial, last</i>		
<i>*Phone area code, number, extension</i>	<i>*Email address</i>	
<i>Plans this user may access</i>	<i>Level of access for this user</i>	
	<i>View only</i>	<i>View and transact</i>
<i>All plans for this firm Specify level of access at right.</i>		
<i>Only the following plans Specify level of access at right.</i>		
<i>Plan number</i>		
<i>Plan number</i>		
<i>Plan number</i>		

User 4

<i>*Name first, middle initial, last</i>		
<i>*Phone area code, number, extension</i>	<i>*Email address</i>	
<i>Plans this user may access</i>	<i>Level of access for this user</i>	
	<i>View only</i>	<i>View and transact</i>
<i>All plans for this firm Specify level of access at right.</i>		
<i>Only the following plans Specify level of access at right.</i>		
<i>Plan number</i>		
<i>Plan number</i>		
<i>Plan number</i>		

*Required information.

To add more than four users, provide the information on a separate sheet.

Return ALL pages of this form, even if some sections are left blank.

3. Add, change, or remove access or users

Complete this section to change access for an existing firm.

- If you're *adding* a new user, specify the plan number and access level.
- If you're *adding* a plan to an existing user, specify the plan number and access level.
- If you're *changing* an existing user's access level, you must specify to which plans changes apply.
- If you're *removing* an existing user from your firm's access, you must specify from which plans the user should be removed. Access for that user will be deactivated for each designated plan upon receipt of your instructions. If you don't list a plan number, the user's access to all plans will be deactivated.

User 1

*Name <i>first, middle initial, last</i>					
*Phone <i>area code, number, extension</i>			*Email address		
Plans this user may access	New access		Change/Remove access		
	<i>View only</i>	<i>View and transact</i>	<i>View only</i>	<i>View and transact</i>	<i>Remove</i>
All plans for this firm <i>Specify level of access right.</i>					
Only the following plans <i>Specify level of access right.</i>					
<i>Plan number</i>					
<i>Plan number</i>					
<i>Plan number</i>					

*Required information.

Return ALL pages of this form, even if some sections are left blank.

User 2

<i>*Name first, middle initial, last</i>					
<i>*Phone area code, number, extension</i>			<i>*Email address</i>		
Plans this user may access	New access		Change/Remove access		
	<i>View only</i>	<i>View and transact</i>	<i>View only</i>	<i>View and transact</i>	<i>Remove</i>
All plans for this firm <i>Specify level of access right.</i>					
Only the following plans <i>Specify level of access right.</i>					
<i>Plan number</i>					
<i>Plan number</i>					
<i>Plan number</i>					

User 3

<i>*Name first, middle initial, last</i>					
<i>*Phone area code, number, extension</i>			<i>*Email address</i>		
Plans this user may access	New access		Change/Remove access		
	<i>View only</i>	<i>View and transact</i>	<i>View only</i>	<i>View and transact</i>	<i>Remove</i>
All plans for this firm <i>Specify level of access right.</i>					
Only the following plans <i>Specify level of access right.</i>					
<i>Plan number</i>					
<i>Plan number</i>					
<i>Plan number</i>					

**Required information.*

Return ALL pages of this form, even if some sections are left blank.

User 4

<i>*Name first, middle initial, last</i>					
<i>*Phone area code, number, extension</i>			<i>*Email address</i>		
<i>Plans this user may access</i>	<i>New access</i>		<i>Change/Remove access</i>		
	<i>View only</i>	<i>View and transact</i>	<i>View only</i>	<i>View and transact</i>	<i>Remove</i>
<i>All plans for this firm Specify level of access right.</i>					
<i>Only the following plans Specify level of access right.</i>					
<i>Plan number</i>					
<i>Plan number</i>					
<i>Plan number</i>					

**Required information.*

To update access levels for more than four users, provide the information on a separate sheet.

Return ALL pages of this form, even if some sections are left blank.

4. Authorization and signatures

Review the following carefully and provide the proper signature(s) below.

- This form must be signed by an authorized signer or signer(s) as identified in an Organization Resolution on file with Vanguard or in a copy of your firm's Corporate Resolution dated within six months of this request.
- If you would like to verify that your firm has an Organization Resolution on file with Vanguard, contact us.
- The firm contact named in Section 1 will be provided with the individual usernames for all new users designated in Section 2 of this form (temporary passwords will be emailed directly to each user upon registration). The firm contact is responsible for notifying Vanguard immediately when there are changes to the security permissions granted herein.

The undersigned (hereinafter referred to as "you") authorize Vanguard to establish or modify your firm's access level for Vanguard's Institutional Trading Website and online trading, as indicated above. You understand and acknowledge that, in order to complete the online registration process, you will receive a username and temporary password for each new user whom you have identified in Section 2 as having permission to access your firm's information. You acknowledge that you are solely responsible for maintaining the security of your firm's usernames and passwords, and for distributing the temporary password only to the individual user associated with each such username. The usernames and permanent passwords that each individual user creates will remain effective and binding until an authorized representative from your firm notifies Vanguard that any or all of the usernames and/or passwords should be changed and Vanguard has a reasonable opportunity to act upon that request. You, on behalf of your firm, also hereby agree to indemnify, defend, and hold Vanguard harmless from and against any losses your firm—or your clients—suffer (including attorneys' fees) through the use of the Vanguard Institutional Trading Website and Vanguard's online trading service, except when Vanguard is responsible for those losses due to its intentional misconduct.

*Name of firm		
*Name of authorized signer <i>type or print</i>		
Sign here. >	*Signature of authorized signer	*Date <i>mm/dd/yyyy</i>
Name of authorized signer <i>type or print</i>		
Signature of authorized signer		Date <i>mm/dd/yyyy</i>

*Required information.

Return ALL pages of this form, even if some sections are left blank.

Submitting to Vanguard

Make a copy of the completed form for your records. This form must be signed by an authorized signatory on behalf of your firm.

Submit the completed, signed, and dated form to Vanguard via one of the methods below. If you're an existing web user, you may upload the form directly.

Fax: 484-582-2806

P.O. box address (all > Vanguard
USPS mail) P.O. Box 982903
El Paso, TX 79998-2903

Street address > Vanguard
(all FedEx or UPS mail) 5951 Lockett Court, Suite A3
El Paso, TX 79932

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