

 You have the option of establishing/changing this account option on our website [www.mainstayfunds.com](http://www.mainstayfunds.com)

**1 CURRENT ACCOUNT INFORMATION** (Required)

▲ Name of Individual, Custodian, Corporation, or Trust (Exactly as it appears on your account statement)

▲ Name of Joint Tenant(s), Minor, Corporate Officer(s), or Trustee(s) (Exactly as it appears on your account statement)

▲ Fund Name(s) Class Account Number

**2 SYSTEMATIC EXCHANGE PROGRAM**

Owners of MainStay Fund accounts may opt to have a minimum of \$100 exchanged periodically to another MainStay Fund within the same class of shares. A minimum account value of \$10,000 per Fund applies for a systematic exchange established on Investor Class, Class B and Class C shares. New account minimums apply to the fund that the systematic exchange is going into. Please be sure to indicate the "FROM" and the "TO" accounts as well as the dollar amount of the exchange and the date the exchange is to begin. If no date is indicated, the exchange program will run on or about the 5th of each month in which an exchange is to be made. If the account balance is less than the amount to be exchanged, no further exchanges will be made until the account balance is sufficient to cover the exchange. The exchange program may be amended or terminated at any time upon prior notice. See the Prospectus for further details. *Account balances of less than \$1,000 will be charged an annual per account fee. For additional information, including certain exceptions, please see the Prospectus. The fee will be charged on a Fund-by-Fund basis.*

**Note: If the "From" and "To" account registrations are not identical, a Medallion Signature Guarantee is required.**

**Exchange #1:** \$ \_\_\_\_\_ Beginning: \_\_\_\_\_  
▲ Minimum \$100 ▲ Day to Begin Exchanges-MM/DD/YYYY

From: \_\_\_\_\_  
▲ Fund Name Class Account Number

To: \_\_\_\_\_  
▲ Fund Name Class Account Number

Frequency:  Monthly  Quarterly  Semiannually  Annually

**Exchange #2:** \$ \_\_\_\_\_ Beginning: \_\_\_\_\_  
▲ Minimum \$100 ▲ Day to Begin Exchanges-MM/DD/YYYY

From: \_\_\_\_\_  
▲ Fund Name Class Account Number

To: \_\_\_\_\_  
▲ Fund Name Class Account Number

Frequency:  Monthly  Quarterly  Semiannually  Annually

**3 ONE-TIME EXCHANGE** (Please attach additional pages as needed)

Exchanges are permitted between MainStay Fund accounts within the same class of shares and identical account registrations. **A Medallion Signature Guarantee is required if the exchange is being made into an account with a different registration.** If a new account is being established through an exchange, the minimum initial investment amount will apply and account options do not automatically carry over to the new Fund. Please refer to the Prospectus or see your investment professional for current minimum initial investment amounts. *Account balances of less than \$1,000 will be charged an annual per account fee. For additional information, including certain exceptions, please see the Prospectus. The fee will be charged on a Fund-by-Fund basis.*

**Exchange #1:** \$ \_\_\_\_\_ **OR** \_\_\_\_\_ shares **OR** \_\_\_\_\_ %

From: \_\_\_\_\_  
▲ Fund Name Class Account Number

To: \_\_\_\_\_  
▲ Fund Name Class Account Number

**Exchange #2:** \$ \_\_\_\_\_ **OR** \_\_\_\_\_ shares **OR** \_\_\_\_\_ %

From: \_\_\_\_\_  
▲ Fund Name Class Account Number

To: \_\_\_\_\_  
▲ Fund Name Class Account Number

**4 SIGNATURES**

\_\_\_\_\_  
▲ Signature of Shareholder (Exactly as registered) Daytime Phone Number (Important) Date—MM/DD/YYYY

\_\_\_\_\_  
▲ Signature of Shareholder (Exactly as registered) Daytime Phone Number (Important) Date—MM/DD/YYYY

**Medallion Signature Guarantee** required for:

- Systematic exchanges and one-time exchanges when the registration on the "FROM" and "TO" accounts do not match.

The signature(s) must be **Medallion Signature Guaranteed** by an eligible guarantor institution as defined under the Securities Exchange Act to include generally: a bank, broker dealer, municipal securities dealer or broker, credit union, national securities exchange, registered securities association, clearing agency, or savings association. **A notary public is not acceptable.** Eligible guarantor institutions provide Medallion Signature Guarantees that are covered by surety bonds in various amounts. It is your responsibility to ensure the Medallion Signature Guarantee that you acquire is sufficient to cover the total value of your transaction(s). If the surety bond amount is not sufficient to cover the requested transaction(s), the Medallion Signature Guarantee will be rejected.

Place Medallion Signature Guarantee(s) in the space below.

www.mainstayfunds.com

**For Assistance:**  
Call your investment professional or call toll-free 1-800-MAINSTAY 1-800-624-6782 / option 2

**Mailing Address:**  
MainStay Investments  
P.O. Box 8401  
Boston, MA 02266-8401

**Overnight Express Address:**  
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MainStay Funds are distributed by NYLIFE Distributors LLC  
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