

## DEFINITIONS AND USAGE OF FORMS

### Available Digital Forms

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#### [BNY Mellon Family of Funds Account Application](#)

To open an individual, joint, custodial, trust, estate or conservator/guardian account.

#### [Account Options Form](#)

Add or change services such as Distribution Options, Automatic Asset Builder, Auto Exchange and Banking privileges on one or more of your accounts. The form must be signed by all registered owners.

#### [Add/Change or Removal of Dealer Authorization Form](#)

Shareholders that elect to change their Broker/Dealer of record can complete the Add/Change or Removal of Dealer Authorization Form. The form must be signed by all registered owners.

#### [Address Change Form](#)

Change the address of record on your account(s). The form must be signed by all registered owners.

#### [Beneficiary Designation Form](#)

Designate or change beneficiaries on your account(s) for IRAs or Non-IRAs Individual or Joint Tenant Transfer on Death (TOD) accounts. The form must be signed by all registered owners.

#### [Certification of Durable Power Of Attorney Form](#)

Provide and attest to the authenticity of the Durable Power of Attorney document for one or more accounts. The certification confirms that the document is a true copy and, there is no knowledge or awareness of any revocation, termination, or facts suggesting the same due to death or other reasons as of the present date. The form must be signed by all registered owners.

#### [Cost Basis Election Form](#)

Elect or change the cost basis method for one or more accounts.

It's important to note that money market funds and retirement accounts are exempt from cost basis reporting and should not be included on this form.

#### [Name Change Form](#)

Change the registration on an account because of a legal name change. The form must be signed by all registered owners.

#### [Request For Information Form](#)

Request specific information about an account(s), such as determining beneficiaries, obtaining balance information, or obtaining account-specific documents on an account(s). To complete the form, all relevant account information must be available, and in some cases, a copy of a driver's license and any relevant legal documents may be required to be attached before submitting the form.

#### [IRS Form W-9](#)

Add, change or certify the Social Security Number or Taxpayer Identification Number on an account. The form must be signed by an authorized party.