

# *the primary trend* FUNDS

## AUTOMATIC INVESTMENT PLAN APPLICATION

Use this form to establish an Automatic Investment Plan with any of The Primary Trend Funds. You can purchase Fund shares once or twice a month by authorizing automatic transfer from your checking or NOW account at no cost to you.

Mail to: **THE PRIMARY TREND FUNDS**  
c/o U.S. Bancorp Fund Services, LLC  
P.O. Box 701  
Milwaukee, WI 53201-0701

### TERMS

- ◆ Your Fund account must be established before the plan goes into effect. If you're opening a new Fund account, please include a completed Account Application with this application.
- ◆ This application must be accompanied by a "voided" check or deposit slip to ensure accurate bank account information.
- ◆ This application must be received at least 14 days prior to the initial transaction.
- ◆ A separate Automatic Investment Plan application must be submitted for each Fund or account.
- ◆ There is a \$50 minimum investment for all Automatic Investment Plan purchases. Investments may be made on the 5th day of each month, the 20th day of each month, or both. (If such day falls on a weekend or holiday, your investment will be made on the next business day.)
- ◆ If the automatic purchase cannot be made due to insufficient funds or stop payment, you will be assessed a \$25 service fee.
- ◆ You can terminate the Plan at any time by writing to U.S. Bancorp Fund Services, LLC. Please allow 5 business days to become effective.
- ◆ The Plan will be terminated upon redemption of all shares in your account (including exchanges to other Primary Trend Funds or First American Prime Obligations Fund Class A). Additionally, the Plan may be terminated or modified at any time without notice by The Primary Trend Funds or U.S. Bancorp Fund Services, LLC.
- ◆ IRA contributions apply as a current year purchase (purchases may not be used for prior year contributions).

If you have any questions about the Automatic Investment Plan, please call The Primary Trend Funds at (800) 443-6544 or U.S. Bancorp Fund Services, LLC.

### SHAREHOLDER INFORMATION

Name(s) on Account

Your Address

City

State

Zip

Your Telephone Number

# INVESTMENT INSTRUCTIONS

- I would like to invest \$ \_\_\_\_\_ (\$50 minimum) on the 5th of each month.\*
- I would like to invest \$ \_\_\_\_\_ (\$50 minimum) on the 20th of each month.\*
- I would like to invest \$ \_\_\_\_\_ (\$50 minimum) on both the 5th and the 20th of each month.\*

in:  The Primary Trend Fund . . . . . Account Number\*\* \_\_\_\_\_

The Primary Income Fund . . . . . Account Number\*\* \_\_\_\_\_

First American Prime Obligations Fund Class A . . . . . Account Number\*\* \_\_\_\_\_  
(Money Market Fund)

\* If such day falls on a weekend or holiday, your investment will be made on the next business day.  
\*\* If you are opening a new account, please write "New Account" instead of an account number.

# BANK INFORMATION

*Please enclose your voided check or deposit slip to ensure accurate bank account information.*

_____	_____		
Bank Name	Name(s) on Your Bank Account		
_____	_____		
Bank Address			
_____	_____		
	Checking or NOW Account Number		
_____	_____		
City	State	Zip	Bank Telephone Number

# SIGNATURES

The Automatic Investment Plan is governed by the terms outlined in this applications and the prospectus. These terms may be amended or supplemented from time to time. I have read and understand the terms of The Primary Trend Funds' Automatic Investment Plan. I also understand that this Plan may be terminated or modified at any time by the The Primary Trend Funds or U.S. Bancorp Fund Services, LLC.

I authorize you to honor all debit entries via the ACH Network initiated once or twice a month through U.S. Bank, N.A. on behalf of U.S. Bancorp Fund Services, LLC. All such debits are subject to sufficient collected funds in my account to pay the debit when presented.

_____	_____
Signature of Owner	Date
_____	_____
Signature of Joint Owner	Date