

Requests for Establishing or Changing a Systematic Contribution or Distribution



We heard your feedback about our current Systematic Pre-Process cycle and are evaluating technological solutions to shorten that time frame. While we work toward those solutions, we wanted to outline the existing process and set expectations for establishing or changing a systematic contribution or distribution.

To ensure a contribution or distribution payment is posted on the appropriate date, please submit your request at least **eight business days prior** to the expected payment date.

The eight day systematics process is an automated cycle that places a pending transaction on the account, ensures cash is available, and submits transmission files to an applicable bank. If you miss the cut-off date, you can submit a one-time request.

If a form is received within the eight business day processing window, the systematic will be set up for the next scheduled date. **If you miss the cutoff, you can submit a one-time request.**

If you have any questions, please contact your Client Services Advocate.

Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.

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