



Transaction Request

Questions? Call 1-800-572-1472

ACH and Wire -
Transfer and Exchange -
Stop Payment -

Instructions: Please complete this form to initiate a transaction to/from your PLGIT account using pre-existing banking instructions, to request a stop payment, or to notify the Trust of an incoming wire. Submit this form through Connect, or fax or mail this form to the fax number or address at the bottom of the page.

INVESTOR INFORMATION: (Please enter Investor's name.)

Investor Name: _____
(Name that appears on Trust records)

TIN: _____
(Taxpayer Identification Number)

TRANSACTION TYPE: (Please select a transaction type and complete the detail instructions below.)

Wire Purchase (Your Entity's bank will wire the requested amount **TO** the Trust on the date listed below in order to purchase shares.)

PLGIT Account #: _____ PLGIT-Class _____ PLGIT/Reserve-Class _____ PLGIT/PRIME _____ Transaction Date: _____

Transaction \$ Amount: _____ Sending Bank Name: _____

The wire or ACH instruction referenced below must already exist with the Pool. To set up new instructions, complete and submit either the **Wire Setup** or **ACH Setup** instruction form. (* = Required fields)

Wire Redemption (The requested amount is to be wired **FROM** the Trust using the pre-existing wire instructions below.) **Not an option for PLGIT/Reserve-Class.**

ACH Purchase (The requested amount is to be transferred **TO** the Trust using pre-existing ACH instructions and available on the next business day.)

ACH Redemption (The requested amount is to be transferred **FROM** the Trust using pre-existing ACH instructions and available on the next business day.)

*PLGIT Account #: _____ PLGIT-Class _____ PLGIT/Reserve-Class _____ PLGIT/PRIME _____ *Transaction Date: _____

*Bank Name: _____ *Transaction \$ Amount: _____

*Bank Account #: _____ *Legal Account Owner: _____

*ABA or Routing #: _____ Further Credit Account #: _____

Nickname: _____ Further Credit to/Addenda Information: _____

TRANSFER (Shares are to be transferred by the PLGIT Client Services Group from one account to another within the same share class.)

From PLGIT Account #: _____ PLGIT-Class _____ PLGIT/Reserve-Class _____ PLGIT/PRIME _____ To PLGIT Account #: _____

Transaction Date: _____ Transaction \$ Amount: _____

EXCHANGE (Shares are to be exchanged by the PLGIT Client Services Group from one share class to another within the same account.)

PLGIT Account #: _____ Transaction Date: _____

Share Exchange from: PLGIT-Class to PLGIT/Reserve-Class PLGIT-Class to PLGIT/PRIME PLGIT/Reserve-Class to PLGIT/PRIME
PLGIT/Reserve-Class to PLGIT-Class PLGIT/PRIME to PLGIT-Class PLGIT/PRIME to PLGIT/Reserve-Class

Transaction \$ Amount: _____

STOP PAYMENT (The PLGIT Client Services Group will place a stop payment on the desired check(s) listed below.)

PLGIT Account #: _____ Payee: _____

Check #: _____ Issue Date: _____

Check \$ Amount: _____ Reason: _____

SIGNATURE: (Please have a Contact, who is authorized per Trust records to initiate purchases and redemptions of shares, sign below.)

Authorized Signature

Date

Phone #

Print or Type Name of Authorized Signatory

Title/Position

Email Address

Any document containing sensitive information received by email will not be accepted. Please send by uploading through Connect, fax, or mail.

SEND VIA CONNECT: Log in to Account Access
Existing Connect Click ☒ Secure Contact
Users Only Select file to upload - Send message

FAX TO: PLGIT Client Services Group
1-800-252-9551

MAIL TO: PLGIT Client Services Group
P.O. Box 11760
Harrisburg, PA 17108-1760

TRUST USE ONLY

V2022.05	INITIALS
Processed	
Confirmed	