



Polar Investment Counsel, Inc.

Brokers and Investment Advisors; Member NASD, NFA, SIPC, MSRB
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Website: www.polarinvest1.com

Securities Accounts Cleared Through:
Southwest Securities Inc. Member NYSE
Futures Accounts Placed With:
Zephyr Investment Group Inc.

Outside Entity (NCFA) Address Change Instructions

Outside entity/non-clearing firm account (NCFA) funds must be separately notified of a clients address change. It is your responsibility to notify the company if you can do so without the client's intervention. Listed below are general instructions and documents that may be required. All forms, letters and documents listed below can be found on the Compliance website. Please notify the Home Office of any changes to the information listed below.

Company/Fund Name	General Instructions	Forms (located on Compliance website)
American Funds	Client can make changes online if they have an account access. Complete letter and send to client for signature. Client mails letter to American Funds.	Client Address Chg Instruction Letter American Funds Address Chg Letter www.americanfunds.com
Frontier Funds (Equinox Funds)	Send email to: ntrujillo@equinoxllc.com Include in email: Client name & account number Old and new address	Attn: Nichole Trujillo
ICON	Complete letter and send to client for signature. Client mails letter to ICON. Include a stamped addressed envelope for client to use.	Client Address Chg Instruction Letter ICON Address Change Letter
MainStay Annuities (New York Life)	Complete form (sections 1, 4 & 13) and send to client for signature. Client mails form to MainStay. Include a stamped addressed envelope for client to use.	Client Address Chg Instruction Letter NYL MainStay Policy Request Form
Putnam Funds	Client can submit an address change online if they have online account access; or by phone (1-800-225-1581); or by mail; complete letter and send to client for signature. Client mails letter to Putnam.	Client Address Chg Instruction Letter Putnam Funds Address Change Letter www.putnam.com
Quadriga Funds	Send email to: heather.trigg@superfund.com Include in email: Client name & contract number Old and new address	Attn: Heather Trigg

Security Benefit Life

Broker calls SBL and through a series of prompts, enters the appropriate information via phone.

Automated number: 800-888-2461
Press 4 – Press 1
Name (first last) – press #
Contract number – press #
Last 4 digits of SS# - press #
Address (new) – press #
Phone (if changed) – press #
Press # to end submission

Wells Real Estate Funds

Client calls Wells Real Estate and makes change over the phone. Wells Real Estate will send out a confirmation letter to the client based.

Client Address Chg Instruction Letter
Phone Number to Client Services:
800-557-4830