



Return Completed Form to:  
 Sterling Capital Funds  
 P.O. Box 9762  
 Providence, RI 02940-9762  
 For assistance, call (800) 228-1872

## AUTOMATIC INVESTMENT PLAN FORM

Please use this form to add or change Automatic Investment Plan instructions to your pre-existing Sterling Capital Funds account.

**ACCOUNT OWNER:** \_\_\_\_\_

**JOINT OWNER (IF APPLICABLE):** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_  
STREET ADDRESS CITY STATE ZIP

**ACCOUNT NUMBER:** \_\_\_\_\_

**Please check one:**       Add Banking Instructions      or       Change Current Banking Instructions

- If establishing a new systematic investment into a new fund, please include a check in the amount of \$25.00 for the initial payment as the bank account is unable to be drafted for the initial deposit.
- Minimum automatic investment is \$25.00 per fund.
- All retirement account contributions invested using the Automatic Investment Plan will be current year contributions.
- We will establish your banking instructions using the voided check attached in the space provided below.
- If the investment date falls on a day the NYSE is not open for business, the investment date will occur on the next day the NYSE is open for business.

I would like to automatically invest from my bank account to my Sterling Capital Funds account on the following basis:

\* If you not indicate a frequency, then we will default to monthly.

Weekly       Bi-Monthly       Monthly       Quarterly       Semi-Annually       Annually

Beginning in the month of \_\_\_\_\_, the investment(s) marked below will take place on the following day(s) \_\_\_\_\_ and \_\_\_\_\_.

\* If you do not indicate a date of the month, then we will default to the 15<sup>th</sup> of the month.

Please debit the below amount(s) from my:       Checking Account      or       Savings Account

**Fund Name**

**Select a Share Class (required)**

	<b>A</b>	<b>C</b>	
Behavioral Large Cap Value Equity Fund	<input type="checkbox"/> (010)	<input type="checkbox"/> (210)	\$ _____
Mid Value Fund	<input type="checkbox"/> (012)	<input type="checkbox"/> (212)	\$ _____
Behavioral Small Cap Value Equity Fund	<input type="checkbox"/> (015)	<input type="checkbox"/> (215)	\$ _____
Special Opportunities Fund	<input type="checkbox"/> (021)	<input type="checkbox"/> (221)	\$ _____
Equity Income Fund	<input type="checkbox"/> (022)	<input type="checkbox"/> (222)	\$ _____
Behavioral International Equity Fund	<input type="checkbox"/> (025)	<input type="checkbox"/> (225)	\$ _____
Mid Cap Relative Value Fund	<input type="checkbox"/> (026)	<input type="checkbox"/> (226)	\$ _____
Real Estate Fund	<input type="checkbox"/> (027)	<input type="checkbox"/> (227)	\$ _____
Small Cap Value Fund	<input type="checkbox"/> (028)	<input type="checkbox"/> (228)	\$ _____
SMID Opportunities Fund	<input type="checkbox"/> (064)	<input type="checkbox"/> (264)	\$ _____
Ultra Short Bond Fund	<input type="checkbox"/> (039)		\$ _____
Short Duration Bond Fund	<input type="checkbox"/> (040)	<input type="checkbox"/> (240)	\$ _____
Intermediate U.S. Government Fund	<input type="checkbox"/> (041)	<input type="checkbox"/> (241)	\$ _____
Total Return Bond Fund	<input type="checkbox"/> (042)	<input type="checkbox"/> (242)	\$ _____
North Carolina Intermediate Tax Free Fund	<input type="checkbox"/> (045)	<input type="checkbox"/> (245)	\$ _____
South Carolina Intermediate Tax Free Fund	<input type="checkbox"/> (046)	<input type="checkbox"/> (246)	\$ _____
Virginia Intermediate Tax Free Fund	<input type="checkbox"/> (047)	<input type="checkbox"/> (247)	\$ _____
West Virginia Intermediate Tax Free Fund	<input type="checkbox"/> (048)	<input type="checkbox"/> (248)	\$ _____
Long Duration Corporate Bond Fund	<input type="checkbox"/> (080)	<input type="checkbox"/> (280)	\$ _____
Quality Income Fund	<input type="checkbox"/> (081)	<input type="checkbox"/> (281)	\$ _____
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____

**Total**      \$ \_\_\_\_\_

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***Attach a voided check in the space provided below.***

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ATTACH VOIDED CHECK HERE

**Note:**

- It can take up to 20 business days to enable this feature.
- At least one of the names on your check must match the name(s) on your account.

I authorize the above systematic investment(s) to be made on my Sterling Capital Funds account utilizing the bank account information listed above.

\_\_\_\_\_  
Signature of Account Owner                      Date

\_\_\_\_\_  
Signature of Joint Owner (If applicable)                      Date