

**Information Sharing and Account Transfer Consent**

TO: PACE Credit Union ("PACE")  
AND TO: MRS Inc ("MRS")  
AND TO: Credential Asset Management Inc. ("Credential")

**RE: Change of Dealer by PACE from MRS to Credential**

**Pursuant to the change of mutual fund dealer by PACE from MRS to Credential, I hereby authorize and direct both MRS and PACE to immediately share all of my personal and financial account information ("Account Information") in their possession with Credential.**

I have been informed and agree that:

- The relationship between Credential and PACE is that of a mutual fund dealer providing mutual fund dealer services to the credit union;
- The relationship between MRS and Credential is that of two non-affiliated mutual fund dealers;
- Credential will use my Account Information to assist in the move of my mutual fund dealer accounts(s) from MRS to Credential and Credential will not share my Account Information with others without my written consent;
- I have the right to revoke my consent, in which case PACE and MRS will not share my Account Information with Credential;
- My consent to information sharing is not required as a condition of MRS or PACE dealing with me or providing a product or service to me in any way; and
- MRS as my prior dealer is required by applicable law to retain all original documents and records and copies of all electronic documents relating to my account(s) ("Client Documentation")

**I hereby provide consent and direction to my current representative to make a copy of my Client Documentation and provide the same to Credential for the purposes of preparing for the transfer, and continuing to provide services to me at Credential following the transfer.**

X \_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

X \_\_\_\_\_  
Joint Client Signature

\_\_\_\_\_  
Date

Name of: Person / Corporate / Non-Personal Entity: \_\_\_\_\_

**I hereby authorize and direct the transfer of all of my MRS account(s) associated with PACE to Credential on June 1<sup>st</sup>, 2009 or as soon as possible thereafter. I also authorize and direct Credential to insert my account types(s) and number(s) on this form if necessary to facilitate the transfer of my account(s) from MRS to Credential. I also authorize and direct MRS to accept this form on its own or, if required, Credential may attach this form to a transfer form (whether electronic or hard copy), to facilitate the transfer of my account(s) from MRS to Credential. I also instruct Credential, where possible, to continue will all of my existing pre-authorized contributions, systematic withdrawal plans and similar instructions following the transfer.**

X \_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

X \_\_\_\_\_  
Joint Client Signature

\_\_\_\_\_  
Date

Name of: Person / Corporate / Non-Personal Entity: \_\_\_\_\_

*Internal Use Only:*

Signature Guarantee: \_\_\_\_\_ (PACE Credit Union)