



Virtus Mutual Funds  
 PO Box 9874  
 Providence RI 02940-8074

**Request to add a Secondary  
 Social Security Number for  
 Online Account Access**

**For assistance, please contact us at 800-243-1574 or visit our website at Virtus.com**

**1. Important Information**

- This form is used to add a secondary account holder's Social Security number to accounts eligible for online account access through Virtus.com. A User ID may be created through our website for each Social Security number maintained on an account.
- You understand and acknowledge that, in order to complete the online registration process for access to the account(s), you will establish a User ID and password for accessing the account(s). You acknowledge that each individual with account access is solely responsible for maintaining the security of such individual's user name and password.
- A valid Social Security number is required for account access through Virtus.com.
- This form cannot be used to change the taxable Social Security number on an account or change the account ownership. For proper instructions on how to process these transactions, please contact a representative at the number above.

**2. Account Information**

Shareholder Name/Registration	Daytime Phone Number
Address	Email Address
City, State, ZIP Code	Account Number(s)

**3. Signatures and Certification**

**Please provide the following owner information regarding the account(s) listed above. Generally, the first individual listed in the account registration is considered the taxable individual. For custodial accounts registered under the Uniform Transfers to Minors Act (UTMA) or the Uniform Gifts to Minors Act (UGMA), the minor should be the taxable individual. By completing the following information, Virtus Mutual Funds will add a secondary Social Security number to the account(s).**

\_\_\_\_\_  
 Name of Taxable Individual Taxable Social Security Number

\_\_\_\_\_  
 Name of Secondary Individual Secondary Security Number

For each person providing a taxpayer identification number on this form, under penalties of perjury, I certify that: (1) the number shown on this form is my correct taxpayer identification number; and (2) I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the IRS that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and (3) I am a U.S. person (including a U.S. resident alien); and (4) The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct. Cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

NOTE: The IRS does not require your consent to any provision on this application other than the certification required to avoid backup withholding.

If I am a nonresident alien, I am required to complete the appropriate Form W-8 to certify my foreign status. I understand that I am not under penalties of perjury certifying the above information.

We authorize Virtus Fund Services to add a secondary Social Security number to the account(s) listed in Section 1. If the Social Security number is being added to the account for the purposes of establishing online account access through Virtus.com, we understand a User ID must be established. We agree to hold Virtus Mutual Funds, its agents and assigns harmless from and against any losses we may suffer (including attorney's fees) through the use of online access, except when Virtus is responsible for those losses due to its intentional misconduct.

\_\_\_\_\_  
 Print Name Signature Date

\_\_\_\_\_  
 Print Name Signature Date