

# AUTOMATIC INVESTMENT SERVICE



**MAILING ADDRESS**

Weitz Funds  
P.O. Box 182785  
Columbus, OH 43218-2785

**OVERNIGHT MAILING ADDRESS**

Weitz Funds  
4249 Easton Way, Suite 400  
Columbus, OH 43219

**PHONE**

(888) 859-0698

**FAX**

(833) 552-1678

**EMAIL**

ta.processing@fisglobal.com

**1. WEITZ FUNDS FUND / ACCOUNT NUMBER**

Account Title \_\_\_\_\_ Social Security # / Tax ID \_\_\_\_\_  
Fund \_\_\_\_\_ Account # \_\_\_\_\_

- This is a new request for automatic investment service.
- This is an update to existing automatic investment service.
- This is an addition to existing automatic investment service.

**2. BANK INFORMATION**

Bank Name \_\_\_\_\_ Bank Account Number \_\_\_\_\_  
Bank Address \_\_\_\_\_ Bank Account Title \_\_\_\_\_  
Bank Routing Number \_\_\_\_\_ Bank Account Type  Checking  Savings  
(nine digit number) Please attach a voided check or savings deposit slip for this bank account.

**3. AUTOMATIC INVESTMENT BY ACH**

Automatic investment purchases made to IRA accounts will be designated as a contribution for the tax year in which the purchase was made.

| Fund  | \$ Amount | FREQUENCY                |                          |                          |                          |                          |                          |                          |                          | Beginning (Month/Year) |
|---|-----------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|------------------------|
|   |           | 1st                      | 8th                      | 15th                     | 22nd                     | Monthly                  | Quarterly                | Semi-Annually            | Annually                 |                        |
| Value Fund / WVALX & WVAIX / 328 & 541                    | _____     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | /                      |
| Partners Value Fund / WPVLX & WPVIX / 331 & 562           | _____     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | /                      |
| Partners III Opportunity Fund / WPOPX & WPOIX / 310 & 436 | _____     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | /                      |
| Hickory Fund / WEHIX / 332                                | _____     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | /                      |
| Balanced Fund / WBALX & WBAIX / 400 & 540                 | _____     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | /                      |
| Short Duration Income Fund / WEFIX & WSHNX / 329 & 437    | _____     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | /                      |
| Core Plus Income Fund / WCPBX & WCPNX / 573 & 574         | _____     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | /                      |
| Nebraska Tax-Free Income Fund / WNTFX / 311               | _____     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | /                      |
| Ultra Short Government Fund / SAFEX / 330                 | _____     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | /                      |

I authorize Weitz Funds and the bank named in the Bank Information section to initiate entries to my account (\$25 minimum per purchase). I further authorize such entries to my account, per these instructions, as may be necessary to adjust any entries that were previously initiated. I authorize the bank to accept and to debit the amount of such entries to my account.

This authority will remain in effect until I notify you to cancel. I can stop or change the dollar amount of this automatic service by notifying you three (3) business days before my account is charged. Changes to bank information require fifteen (15) days notice.

If any weekends or holidays occur on these days, the investment will be processed on the next business day. ACH processing takes approximately two (2) business days to complete.

**4. ACCOUNT OWNER SIGNATURE(S)**

Account Owner \_\_\_\_\_ Date \_\_\_\_\_ Account Owner \_\_\_\_\_ Date \_\_\_\_\_  
Account Owner \_\_\_\_\_ Date \_\_\_\_\_ Account Owner \_\_\_\_\_ Date \_\_\_\_\_

**ALL ACCOUNT OWNERS ARE REQUIRED TO SIGN THIS FORM.**