



September 16, 2019

[Recipient]

[Title]

[Company]

[Address 1]

[Address 2]

[Address 3]

Important Waddell & Reed, Inc. Group Plan Purchase Information:

In conjunction with recent branding changes to Ivy Investments, all checks should now be made payable to **Ivy Funds**. An updated Form W-9 has been enclosed for your records.

Before submitting your next group plan purchase for Ivy Investments:

- Make your group plan purchase check payable to **Ivy Funds** and/or
- Manage your plan using Plan Sponsor Connect and initiate purchases by ACH via online access

If you have any questions regarding this change, or for more information on submitting transactions utilizing Plan Sponsor Connect please contact Ivy Client Services at 1.800.366.2520 - Option 7.

Sincerely,

Ivy Client Services