

Online Account Access Request Form



This form is used to request online account access to cooperative/company accounts, individual deferred compensation participant accounts, or intermediary accounts. Different cooperative/company account types may have different online transaction capabilities. Online access will allow the cooperative/company representative to view and/or transact on any cooperative/company accounts with online transaction capabilities created under the requested cooperative/ company tax identification number. Online access will allow the individual deferred compensation participant to view and/or transact on individual deferred compensation accounts in their name. Online access for intermediaries will allow view only capabilities.

Return your completed form to:

Regular Mail

Homestead Funds
P.O. Box 46707
Cincinnati, OH 45246-0707

Overnight Mail

Homestead Funds
225 Pictoria Drive
Suite 450
Cincinnati, OH 45246

Fax

877-513-0756

1. Access Level

Check one:

Cooperative/Company

Access requested for the cooperative/company will allow permission to view and act on accounts online for all accounts under the cooperative/company tax identification number. Each cooperative/company representative that requires access must complete a separate form.

Different cooperative/ company account types may have different online transaction capabilities.

Individual Account

Access requested for the individual account will allow permission to view and act on the specified deferred compensation account(s). This option is only available for the FBO participant named in the account registration.

Intermediary

Fund Dealer Branch Rep

Access requested for the intermediary will allow permission to view accounts online for all accounts under the intermediary's BIN. Each intermediary representative that requires access must complete a separate form.

2. Account Information

Cooperative/Company Name or Individual Name or Intermediary Name

Cooperative/Company or Individual Tax Identification Number or Intermediary BIN

Specific Account Numbers for Requested Access _____

(if you are requesting cooperative/company or intermediary access, only list one account number under the cooperative/company tax identification number or intermediary BIN)

Desired User ID _____

Your user name must have between 6 and 12 characters and can contain numbers, letters or special characters [-_!@#\$\$%^&*].

Online Account Access Request Form



3. Contact Information

Requestor's Name

Requestor's Title

Contact Telephone Number (in case we have questions)

 - -

Contact Fax Number

 - -

Contact Email Address

Secret Question — What city were you born in? (Required for Account Set-Up)

I/We hereby authorize Ultimus Fund Solutions, LLC, the transfer agent for the Fund, to initialize internet access for the above registered requestor.

Requestor's Signature

Date (mm/dd/yyyy)

 / /

Authorized Employer Representative Signature on File with Homestead Funds (Required for Company/Cooperative access and for Individual Deferred Compensation Account access)

INTERNAL USE ONLY

The representative named above is allowed internet access to all of his/her shareholder accounts which are registered under the following broker identification codes:

The registered representative named above has been granted access to the accounts specified under the above codes, and has been assigned the following User Name and Initial Password:

User ID

Initial Password*

*The password is case sensitive. The user will be forced to change the initial password, which can be done under the "My Profile" menu.

Authorized by

Date (mm/dd/yyyy)

 / /

DELIVERY CONFIRMATION

The above User Name and Initial Password were given to the registered representative noted.

Given by

Date (mm/dd/yyyy)

 / /

Sent via: Secure Email Fax

Additional comments:
