

Investment Account Application

You'll need the following to complete this form:

- Your Social Security number or Taxpayer Identification Number (required by the Patriot Act).
- Your bank information (a voided check has everything you need).
- A residential address that is not a P.O. box.

Mail this form to For assistance, call

Motley Fool Funds 1-888-863-8803
P.O. Box 9780
Providence, RI 02940

To open an account online, visit

<http://www.foolfunds.com>

1 About You

First Name M.I. Last Name Suffix

Social Security Number Date of Birth

(Please select one of the options below.)

- I am: registering for an **Individual Account**.
(Skip to Section 2.)
- registering for a **Joint Account** owned by myself and another individual.
(Fill out Section 1a.)
- a custodian registering for a **Uniform Gift or Transfer to Minor** to invest on behalf of a minor.
(Skip to Section 1b.)
- a trustee registering for a taxable account owned by an existing **Personal Trust**.
(Skip to Section 1c.)

Currently, you have to be a U.S. resident to be a shareholder or joint shareholder with Motley Fool Funds.

Looking for an IRA?

You cannot use this form to open an individual retirement account (IRA). To open an IRA, please contact us or visit our website.

1a ABOUT THE JOINT SHAREHOLDER

First Name M.I. Last Name Suffix

Social Security Number Date of Birth

(Optional) I would like to designate a different individual as a Transfer-on-Death Beneficiary: _____
Beneficiary's Name

(Skip to Section 2.)

Rights of Survivorship

Joint tenancy with rights of survivorship will be presumed unless otherwise specified.

Transfer-on-Death Beneficiary

By default, the account will go to the joint shareholder. This section is relevant only if you wish to designate a different beneficiary.

1b ABOUT THE MINOR *(for Uniform Gift or Transfer to Minor)*

Minor's First Name M.I. Last Name Suffix

Social Security Number Date of Birth

Under the _____ Uniform Gifts/Transfers to Minors Act
Minor's State of Residence

(Skip to Section 2.)

1c ABOUT THE TRUST AND CO-TRUSTEE

Trust

Trust Name _____

Trust's Social Security or Tax Identification Number _____ Date of Trust Agreement _____

Further documents required.

You must supply one of the following documents to establish this account: Articles of Incorporation, Trust Agreement, or Partnership Agreement.

Co-Trustee

(if applicable)

Name _____ Social Security Number _____ Date of Birth _____

2 Contact Information

Your Mailing Address _____ City _____ State _____ ZIP Code _____

Your Residential Address *(if different from above)* _____ City _____ State _____ ZIP Code _____

Email Address _____ Daytime Phone _____ Evening Phone _____

If the mailing address is a post office box, a residential address is also required by the Patriot Act.

Joint Shareholder or Minor or Co-Trustee

(required if applicable and different from the registrant or custodian or trustee above)

Address _____ City _____ State _____ ZIP Code _____

3 DUPLICATE STATEMENTS (OPTIONAL)

First Name _____ M.I. _____ Last Name _____ Suffix _____

Your Residential Address *(if different from above)* _____ City _____ State _____ ZIP Code _____

This section should be filled out only if you would like another individual or financial advisor to receive copies of your quarterly account statements and transaction confirmations.

4 Initial Investment Amount

Motley Fool Fund	Share Class	Amount to Be Invested
Independence Fund	Investor (#101)	\$ _____ <i>(minimum \$500)</i>
	Institutional (#301)	\$ _____ <i>(minimum \$100,00)</i>
Great America Fund	Investor (#102)	\$ _____ <i>(minimum \$500)</i>
	Institutional (#302)	\$ _____ <i>(minimum \$100,000)</i>
Epic Voyage Fund	Investor (#103)	\$ _____ <i>(minimum \$500)</i>
	Institutional (#303)	\$ _____ <i>(minimum \$100,000)</i>

You can start with as little as \$500 per fund. Then you can choose the Motley Fool Automatic Investment Plan (AIP) to invest as little as \$50 per fund or as much as you like on a regular basis. Please see a prospectus for full details about our funds' strategies, approach to investing, and fees.

(Make checks payable to Motley Fool Funds. The Fund does not accept payment in cash or money orders. The Fund also does not accept third-party checks, Treasury checks, cashier's checks, official checks, teller's checks, credit card checks, traveler's checks, or starter checks for the purchase of shares.)

5 Distributions

(Please select one option for each distribution below. If nothing is checked, all distributions will be reinvested.)

- Dividends** Reinvest Send by Check Send to Bank Account
(Fill out Section 7.)
- Capital Gains** Reinvest Send by Check Send to Bank Account
(Fill out Section 7.)

Why reinvest?

Reinvesting your dividends and capital gains is a great way to take advantage of the power of compounding.

6 Automatic Investment Plan for Subsequent Investments *(optional)*

A minimum initial investment of \$500 is required to get started. To make investing easier, you may choose to have a specified amount (\$50 minimum) automatically transferred from your bank account and invested in your Motley Fool Funds account on a monthly or twice-monthly basis.

Motley Fool Fund	Share Class	Amount to Be Invested
Independence Fund	Investor (#101)	\$ _____ <i>(minimum \$50)</i>
	Institutional (#301)	\$ _____ <i>(minimum \$50)</i>
Great America Fund	Investor (#102)	\$ _____ <i>(minimum \$50)</i>
	Institutional (#302)	\$ _____ <i>(minimum \$50)</i>
Epic Voyage Fund	Investor (#103)	\$ _____ <i>(minimum \$50)</i>
	Institutional (#303)	\$ _____ <i>(minimum \$50)</i>

- Transactions should occur once a month on the _____ day of the month.
- Transactions should occur twice a month on the _____ and _____ days of the month.
(must be a minimum of seven days apart)

(Fill out Section 7.)

If you do not designate a specific day, your money will be transferred on the fifth day of every month.

Please allow at least 15 days after receipt of this application before your Motley Fool Funds Automatic Investment Plan becomes effective.

7 Bank Account

(Required to send cash distributions to your bank account or for setting up an automatic investment plan. Optional if you'd just like to keep your bank information on file for future transactions.)

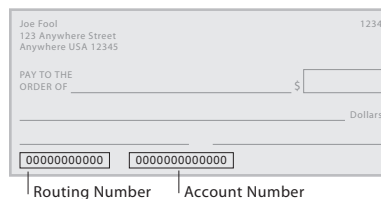
By completing this section and signing below in Section 8, you authorize Motley Fool Funds to deduct money from your bank account via ACH to purchase shares in your Motley Fool Funds account and to send the proceeds of cash distribution and redemption transactions, if requested, via ACH to your bank account.

Routing Number Account Number

Tape your voided check here.

Your request cannot be processed without a check from the account you wish to designate as your bank account.

- Check this box if you wish for us to use your attached purchase check instead of an additional voided check.



What is ACH?

ACH (Automated Clearing House) is a common method of transferring money to and from a bank account.

8 Signatures and Other Required Information

TERMS AND CONDITIONS

The Motley Fool Funds Trust ("Motley Fool Funds") is required by federal law to obtain from each person who opens an account certain personal information -- including full name, Social Security number, permanent street address, and date of birth, among other information-- that will be used to verify identity. If you do not provide us with this information, we will not be able to open the account. If we are unable to verify your identity, Motley Fool Funds reserves the right to close your account or take other steps we deem reasonable.

I have full authority and legal capacity to purchase or redeem fund shares.

I have received and read a current prospectus of each fund that I am investing in.

If I represent a trust or organization, I confirm that the trust or organization is in existence and that I have full authority to enter into investment transactions on behalf of the trust or organization and to execute and deliver documents on its behalf.

If I have chosen an electronic transfer option (by electing to have cash distributions sent to my bank account or by choosing an Automatic Investment Plan and/or by supplying my bank account information in Section 7 above), I authorize Motley Fool Funds to pay amounts representing redemption proceeds, dividends or capital gains distributions, or to secure payment of the amounts invested by me, by initiating credit or debit entries to my account at the bank named in the "Bank Account" section. I authorize the bank to accept any such credits or debits to my account without responsibility for their correctness. I acknowledge that the origination of the ACH transactions to my account must comply with U.S. law. I further agree that Motley Fool Funds will not incur any loss, liability, cost, or expense for acting upon my telephone or online request. I understand that this authorization may be terminated by me at any time by written notification to Motley Fool Funds and to the bank. The termination request will be effective as soon as Motley Fool Funds has had a reasonable amount of time to act upon it.

I agree that if I pay for shares with a check or ACH transfer that does not clear, my purchase will be cancelled and I will be responsible for any resulting losses or expenses incurred by Motley Fool Funds or the transfer agent.

I acknowledge that I have read the Fund's privacy policy available on foolfunds.com.

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 penalty of perjury certifying the above information.

Telephone Exchange and Redemption Privileges

By my signature below, I authorize The Motley Fool Funds Trust ("Motley Fool Funds"), or its designated agents, to accept telephone instructions from any person identifying himself as owner of the account or owner's broker to (a) exchange share(s) of my account for shares of the same class or equivalent class of any other series of the Trust and (b) redeem shares, without signature guarantee, held in my account, unless I have indicated that I do not want the Telephone Exchange and Redemption Privileges by checking the box below. Telephone redemptions and any exchange between series of the Trust are subject to the procedures and conditions set forth in the prospectus, as it may be amended from time to time. I understand that up to \$50,000 may be redeemed by telephone redemption daily. Motley Fool Funds, or its designated agents, will employ reasonable procedures to confirm that such telephone instructions are genuine. Neither Motley Fool Funds, nor its designated agents, will be liable for any loss due to unauthorized or fraudulent instructions if such procedures are followed. Telephone privileges may be modified or terminated without notice. I agree to indemnify and hold harmless Motley Fool Funds, its designated agents, or any of their affiliates that may be involved in transactions authorized by telephone, against any claim, loss, expense or damage, including reasonable fees of investigation and counsel, in connection with any telephone instructions effected for my account. I understand that Motley Fool Funds and its designated agents reserve the right to refuse any request made by telephone, including requests made shortly after a change of address and limit the number of requests within a specified period. I understand that once a telephone transaction has been placed, it cannot be canceled or modified. I understand that if I choose not to have the ability to exchange and redeem shares by telephone, I will also be unable to exchange and redeem shares using the internet.

I do not want the Telephone Exchange and Redemption Privileges.

Single-copy Delivery

I consent to the delivery of one copy of each prospectus, annual and semi-annual report, and other shareholder communications to each address shared by two or more accounts. This consent will become effective when my account is opened and will continue thereafter indefinitely, unless I revoke my consent by calling Motley Fool Funds at 1-888-863-8803, in which case I will begin to receive individual copies within 30 days.

Cost Basis Election

Motley Fool Funds is responsible for tracking and reporting to the IRS your realized gains and losses on covered shares. In general, these are shares acquired on or after Jan. 1, 2012. Motley Fool Funds' default tax lot identification method is Average Cost, which means that the average cost of all the shares in your account is used to determine capital gains/losses. For more information about selecting a cost basis method, please see our Cost Basis page at www.foolfunds.com/planning/costbasis.aspx. Note: Desired changes to your cost basis method must be made prior to a redemption of covered shares. IRS Regulations do not permit you to change your tax lot identification method on a settled trade.

Can you clarify what this means?

Yes. For clarification on any of these certification issues, please contact us for assistance.

You should be aware that if no activity occurs in your account within the time period specified by applicable state law, your account may be closed and the proceeds transferred to the appropriate state. The time period varies by state.

Please note: Joint accounts require the signature of both account owners.

Required by Federal tax law to avoid backup withholding:

I certify under penalties of perjury 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 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)
4. The FATCA code(s) entered on this form (if any – see below) indicating that I am exempt from Foreign Account Tax Compliance Act (FATCA) reporting is correct. If you are exempt from FATCA reporting, please refer to HYPERLINK “http://www.irs.gov” www.irs.gov and enter the appropriate FATCA exemption code(s) found on IRS Form W9 and enter them here _____.

What is FATCA reporting? The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. **Please note: FATCA does not apply to accounts held within the United States. You may leave this field blank.**

Certification Instructions: You must 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.

PLEASE SIGN HERE

Signature of Account Owner, Custodian, or Trustee Date

Signature of Joint Account Owner or Co-Trustee *(if applicable)* Date

And that’s it. Mail this form to:
Motley Fool Funds, P. O. Box 9780, Providence, RI 02940

For Broker / Dealer Use Only

Broker / Dealer Name	Branch Number	Representative Number	
Rep. Name	Rep. Phone	Rep. Email Address	
Branch Mailing Address	City	State	ZIP Code