TheBancorp™

CHANGE IN TERMS REQUEST FORM (INCLUDING THE "INTEREST RATE CONVERSION NOTICE")

Use this Change In Terms Request Form ("Form") when submitting a change in terms request for a securities-backed line of credit account ("Line of Credit Account") provided by The Bancorp Bank, N.A. ("Bank" or "us"). The Form may be completed and then submitted to the Bank by the Account owner ("Borrower," "my," "you," or "your") or the Borrower's authorized financial professional, financial professional firm, financial advisor, life insurance agent, or broker (referred to in this Form as "Financial Professional"). All other defined terms used in this Form have the meanings assigned to them in the SBLOC Agreement and Additional Disclosures ("Agreement").

A requested change in terms will not be effective until (a) Borrower (and all other loan parties as applicable), has executed and returned the loan documents required by the Bank; and (b) Bank confirms its approval of the requested change(s). Interest payments for the Line of Credit Account must be current or the change requested may be declined.

PART 1: Requestor

◯ Borrower ◯ Financial Professional

PART 2: Account Information

_____ _____

Line of Credit Account Title | Line of Credit Account Number

PART 3: Change in Terms Requests

Please complete the applicable section(s).

A. Loan Amount Change

◯ Increase Line of Credit to: _____ ◯ Decrease Line of Credit to: _____

◯ Increase Line of Credit to maximum amount based on eligible Collateral.

_____

Purpose of Increase/Use of Funds

Note: An SBLOC cannot be used for the purchase of additional securities or to pay off a margin loan that was used to purchase securities. If you have any questions about these limitations, please contact the Bank at 866.435.1370 before submitting your request for a change in terms.

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B. Interest Rate Change Options

Option 1: Interest Rate Conversion Notice

NOTE: Please consult your Financial Professional to confirm a 36-month fixed rate is available for your Line of Credit Account.

- ◯ Convert my Line of Credit Account from the existing variable rate to a 36-month fixed rate
- ◯ Convert my Line of Credit Account from the existing 36-month fixed rate to a variable rate
- ◯ Convert my Line of Credit Account from the existing 36-month fixed rate to a new 36-month fixed rate

Option 2: Interest Rate Review

- ◯ Request interest rate review
- ◯ Request custom interest rate (for a line of credit of $1 million or more)

Note: Additional documentation may be required.

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C. Collateral Change

Securities-Backed Line of Credit

Note: Your request may not be approved if the registration of the pledged Securities Account and the titling of the SBLOC are different.

◯ Additional Securities Account(s) to be pledged as Collateral (include any and all sub-accounts, if applicable):

Securities Account Number(s)	Securities Account Title

◯ Remove pledged Securities Account(s) as Collateral:

Securities Account Number(s)	Securities Account Title

◯ Replacement Securities Account(s) to be pledged as Collateral (attach additional page(s) if necessary):

Securities Account Number(s)	Securities Account Title
Securities Account Number(s)	Securities Account Title

Note: Additions, reductions, or other collateral related changes may subject the loan to a different variable interest rate tier.

D. Co-Borrower Change

Additional information may be required when removing or adding a co-borrower.

◯ Option 1: Remove co-borrower

Name of co-borrower to be removed	Reason for removing co-borrower

Note: Removing a co-borrower from an SBLOC releases the co-borrower from all obligations to pay any debt (e.g., divorce, death)

◯ Option 2: Add co-borrower

Name of co-borrower to be added	Name of co-borrower to be added

Note: If a co-borrower is added, the co-borrower may request an Advance in accordance with the Agreement and the Bank is entitled to rely on and will honor such request, in the Bank's sole and absolute discretion, without the consent of any other borrower.

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E. Appointment of Authorized Representative (Personal/Trust)

Please select one option below:

◯ Option 1: Attorney-in-Fact

Name of attorney-in-fact

Reason for the addition of an attorney-in-fact

◯ Option 2: Authorized Representative

Name of authorized representative

Reason for the addition of an authorized representative

F. Trust Name Change

Current name

New name

Reason for name change

G. Add and/or Remove Trustee(s)

Name of Trustee(s) to be removed

Name of Trustee(s) to be added

A copy of the below documents may be required:

- Written resignation of Trustee(s)
- Written appointment of Successor Trustee(s)
- Written acceptance of Successor Trustee(s)

H. Add and/or Remove Authorized Representative (Business Entity)

Name of Authorized Representative to be removed

Name of Authorized Representative to be added

Note: If the existing authorized representatives are to remain, the existing authorized representatives will be required to sign the Bank's resolutions form along with the newly appointed representatives.

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I. Additional Information and/or Miscellaneous Change Request

Use this section to provide any additional details regarding your request or to make a request that is not listed on this Form.

Additional details

PART 4: Financial Professional Information

Financial Professional Name	Financial Professional Firm Name		
Email	Phone (include area code and extension)		
Address	City	State	ZIP Code

PART 5: Signature(s)

Signature(s) Required

I am the Borrower for the Line of Credit Account identified in Part 2 or the authorized Financial Professional for the Line of Credit Account.

Signature of Borrower	Date (mm/dd/yyyy)
Print Borrower Name	
Signature of Authorized Financial Professional	Date (mm/dd/yyyy)
Print Authorized Financial Professional Name	Financial Professional Complete User ID (if applicable)

Please **mail** or **fax** this completed Form to:

The Bancorp Bank, N.A.
Attn: Loan Department

409 Silverside Road, Suite 105
Wilmington, DE 19809

Fax: 302.791.5787
Phone: 866.435.1370

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