ICI wants you to protect yourself and your mutual fund accounts and reclaim money that could already have been taken by state governments.

States are holding more than $40 billion of American’s hard-earned dollars in accounts deemed “lost,” “abandoned,” or “unclaimed.”

If you’ve ever made an investment in a mutual fund account, you may be eligible to reclaim money that could already have been taken by state governments.

States are becoming more aggressive in taking money, including billions from individuals.

If you’re an investor, you can do three things:

1. **CLAIM IT** from the financial institution
2. **LIQUIDATE IT** at present-day value
3. **USE IT** to fill state budget gaps

States are becoming more aggressive in taking money, including billions from individuals.

How do I know if a state already has my money?

- Each state has its own laws for “lost” accounts.
- Some states can close an account if the owner hasn’t made a “contact” by phone or mail in three years.
- Automatic account features, such as reinvested dividends, might not be considered a “contact.”

Who is most vulnerable?

Everyone with a financial account could be at risk... if they haven’t contacted their financial institution (or mutual fund) every three years.

Can I get my money back?

Yes, but you can only get back the amount that the state took at the time it claimed and liquidated the account. You get none of the growth that could have accrued over time. You might even owe tax penalties!

For more information on “lost” property, visit ProtectYourFinances.org

www.ici.org