

**To skip introduction and quickly access the IVR:**

1. Dial 1.800.422.1050
2. Press 1
3. Press 1 again

**You will receive the following greeting:**

“Hello. Welcome to Harbor Funds. How can I help you today? Please say: Fund Information, Request a Document, My Portfolio, or I’m calling about something else.”

**Global Commands**

You can say the commands or dial the numbers below at any time during a call to access the following:

Shareholder Servicing Agent -  
Press ① or say “Agent”

Main Menu -  
Press # or say “Main Menu”

Help -  
Press \* or say “Help”

Yes -  
Press ① or say “Yes”

No -  
Press ② or say “No”

**Tips for the IVR**

1. When using the touchtone feature instead of voice, it is advisable to mute your phone.
2. When accessing your portfolio, always have TIN/SSN, PIN, and account numbers at hand.

**Fund Numbers:**

FUND	INST	ADMN	INV
Small Cap Growth	010	210	410
International	011	211	411
Capital Appreciation	012	212	412
Large Cap Value	013	213	413
Bond	014	214	n/a
Money Market	015	215	n/a
Short Duration	016	216	n/a
International Growth	017	217	417
Mid Cap Growth	019	219	419
Small Cap Value	022	222	422
Mid Cap Value	023	223	423
High-Yield Bond	024	224	424
Real Return	025	225	n/a
Small Company Growth	026	226	426
Global Value	027	227	427
SMID Value	028	228	428

**Obtain Fund Information -**

Say “Fund Information” or Press ① then...

**Say or Press the 3-digit fund number**

Then confirm:

Say “Yes” or Press ①

Say “No” or Press ②

**Fund prices/NAV:**

Say “Prices” or Press ①

**Dividend information:**

Say “Dividends” or Press ②

**Quarter-end performance:**

Say “Performance” or Press ③

**Top holdings:**

Say “Top Holdings” or Press ④



**Information Access**

*“Your Guide to Self-Service”*

Interactive Voice Response  
1-800-422-1050

Harbor Funds Web Site  
www.harborfunds.com

### **Tips**

When requesting documents, have the following ready:

- number of copies needed
- street address and name, or
- TIN/SSN and PIN if you are a shareholder and want to use your address on record

### **Request Documents by Mail -**

Say "Request a Document" or Press ② then...

### **Prospectus :**

Say "Prospectus" or Press ①

### **Regular account application packet:**

Say "Account Application" + "Regular accounts" or

Press ② + ①

### **IRA account application packet:**

Say "Account Application" + "IRA accounts" or

Press ② + ②

### **Institutional account application packet:**

Say "Account Application" + "Institutional accounts" or

Press ② + ③

### **Account maintenance form**

Say "Account Maintenance Form" or

Press ③

### **Tax Brochure:**

Say "Tax Documents" + "Tax Brochure" or

Press ⑤ + ②

### **Annual Report:**

Say "Other Documents" + "Annual Report" or

Press ⑥ + ④

### **Access Your Portfolio Information -**

Say "My Portfolio" or Press ③ then...

### **Security Check**

Dial your TIN/SSN

Then Dial your PIN

### **Portfolio balance:**

Say "Portfolio Balance" or Press ①

### **Purchase:**

Say "Place a Trade" + "Purchase" or

Press ② + ①

### **Redeem:**

Say "Place a Trade" + "Redeem" or

Press ② + ②

### **Exchange:**

Say "Place a Trade" + "Exchange" or

Press ② + ③

### **IRA Contributions:**

Say "Account History" + "IRA Contributions" or

Press ③ + ②

### **Request your 1099 by mail:**

Say "Account Forms" + "1099" or

Press ⑤ + ①

### **Request your 5498 by mail:**

Say "Account Forms" + "5498" or

Press ⑤ + ②

### **Request your Cost Basis Statement by mail:**

Say "Account Forms" + "Average Cost Basis" or

Press ⑤ + ④

\*Some features may not apply to your portfolio.  
Other portfolios may have additional features.

## **Interactive Voice Response (IVR) FAQs**

[As a new shareholder how do I access my account?](#)

You may choose to use either [www.harborfunds.com](http://www.harborfunds.com) or the Interactive Voice Response (IVR) system to access your account.

[What information is required in order to register my account via the IVR?](#)

In order to register to access your account using the IVR, you will need your SSN/TIN, account number and date of birth on record.



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[www.harborfunds.com](http://www.harborfunds.com)

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