

Transfer on Death Beneficiary Designation Form



Use this form to add or update beneficiary records for a regular, taxable account registered to an individual or to joint tenants with right of survivorship. Transfer on death instructions cannot be established for IRA accounts or for joint accounts registered to tenants in common or community property or for UGMA/UTMA, corporate, trust, partnership or omnibus accounts.

So that we can process your instructions without delay or inconvenience to you, please print neatly in blue or black ink. If you have a question about this form, call us at **1-800-258-3030**. Client service associates are available on weekdays from 8:30 a.m. to 5:00 p.m., ET.

Return your completed form to:

REGULAR MAIL

Homestead Funds
c/o BFDS
P.O. Box 219486
Kansas City, MO 64121-9486

OVERNIGHT MAIL

Homestead Funds
c/o BFDS
330 W. 9th Street, 1st Floor
Kansas City, MO 64105-1514
Attn: Shareholder Services

For complete information about Homestead Funds and services, see the prospectus.

 **Be sure to sign your completed form (section 3).**

1. Ownership

Tell us how this account is registered.

Owner's First Name Middle Initial Last Name

Social Security Number

If a Joint Account, Joint Owner's First Name Middle Initial Last Name

Joint Owner's Social Security Number

Check one:

New Account:
(Submit this form with your Regular Account Application.)

Existing Account: Account Number _____
(See a recent statement or trade confirmation for your account number, or call us.)

2. Beneficiary Designation

Complete this section to designate who should receive account assets in the event of your death, or in the case of a joint account, the death of both account owners.

Assets are divided among primary beneficiaries first. If there are no surviving primary beneficiaries, assets are divided among secondary beneficiaries. Attach a separate sheet if you have more than four beneficiaries, and provide all of the information requested here for each beneficiary.

Your most current beneficiary designations replace any previous instructions we have on file.

Note that once you have indicated beneficiaries through the proper execution of this form, a will, trust or other legal document will not change the disposition of these accounts upon death. Because this can affect your tax strategies and estate planning, we suggest you consult with your lawyer or other tax professional for additional information and advice.

Primary Beneficiaries

Name	Relationship	Birth Date	Social Security Number	If minor, name of parent/guardian	Percent
_____	_____	_____	_____	_____	_____%
_____	_____	_____	_____	_____	_____%
_____	_____	_____	_____	_____	_____%
_____	_____	_____	_____	_____	_____%
					100%

Secondary Beneficiaries

Name	Relationship	Birth Date	Social Security Number	If minor, name of parent/guardian	Percent
_____	_____	_____	_____	_____	_____%
_____	_____	_____	_____	_____	_____%
_____	_____	_____	_____	_____	_____%
_____	_____	_____	_____	_____	_____%
					100%

If you are married and reside in a community property or marital property state (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington or Wisconsin), you may need to obtain your spouse's consent if you have not designated your spouse as primary beneficiary for at least half of your account. See your lawyer or other tax professional for additional information and advice.

 **Be sure to sign this form. We cannot act on your instructions without your signature.**

3. Signature

See section 4, Signature Validation Program Stamp, before signing this form.

All account owners named in the registration must sign below.

▶ **X** _____
Signature of Account Owner Date

▶ **X** _____
If a Joint Account, Signature of Joint Account Owner Date

4. Signature Validation Program Stamp

Your signature on this form must be validated if you are establishing transfer on death instructions for an existing account. You do not need signature validation if you are establishing transfer on death instructions for a new account and submitting this form with a completed Regular Account Application. We will not accept a guarantee from a notary. If your guarantor does not use the Signature Validation Program Stamp, please request that they use their Medallion Stamp Signature Guarantee instead. Both types of stamps can be obtained from any eligible guarantor, including banks, broker/dealers and credit unions.

Financial Institution: Affix stamp here.