

# Transaction Request Form



Use this form to request a transaction on your account.

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

**Fax**

703-907-5606

**Note:** Forms with a Medallion Signature Guarantee Stamp cannot be faxed.

If you have a question, call us at **800.258.3030**. For complete information about Homestead Funds and services, see the prospectus, which is available at **homesteadfunds.com** or by calling the above toll-free number.

Be sure to sign your completed form (**Section 4**).

## 1. Ownership

Tell us how your account is currently registered and provide your account number.

Owner/Minor's First Name

Middle Initial

Last Name

Social Security Number

Account Number (s)

Daytime Telephone Number (in case we have questions)

 -  - 

◆ **If a Joint or Minor's Account**

Joint/Custodian's First Name

Middle Initial

Last Name

Social Security Number

Daytime Telephone Number (in case we have questions)

 -  - 

Joint/Custodian's First Name

Middle Initial

Last Name

Social Security Number

Daytime Telephone Number (in case we have questions)

 -  - 

## 2. Beneficiary/Executor/Personal Representative Information

If the account owner has passed away provide the information requested below.

Make sure to complete the deceased shareholder's information in **Section 1**.

Beneficiary/Executor/Personal Representative Name

Relationship to Account Owner

Date of Death (mm/dd/yyyy)

 /  / 

Correspondence Reference Number (if applicable)

Daytime Telephone Number (in case we have questions)

 -  -

# Transaction Request Form



### 3. Written Instructions

### 4. Signature

If this is a joint account all account owners must sign below. If this is a minor account the custodian must sign below. If this is a beneficiary, Trust or Estate account, the signer must provide their title below.

Signature	Title (if applicable)	Date (mm/dd/yyyy)
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Signature	Title (if applicable)	Date (mm/dd/yyyy)
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Signature	Title (if applicable)	Date (mm/dd/yyyy)
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

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

### 5. Medallion Signature Guarantee (MSG) Stamp

For some transactions, Homestead Funds requires a special type of signature guarantee called a "medallion stamp." Some financial institutions such as banks, broker-dealers and credit unions issue them and typically charge a nominal fee for this service. We understand that obtaining a MSG is sometimes inconvenient. However, it is an important way for us to protect you against fraud.

Financial Institution: Affix medallion stamp here.