

# Transaction Request Form



Use this form to request a transaction on your account.

Return your completed form to:

**Regular Mail**

Homestead Funds  
P.O. Box 219486  
Kansas City, MO 64121-9486

**Overnight Mail**

Homestead Funds  
430 W. 7th Street  
Suite 219486  
Kansas City, MO 64105-1407

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](http://homesteadfunds.com) or by calling the above toll-free number.

## 1. Ownership

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

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

Owner/Minor's First Name	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Social Security Number	Account Number (s)	
<input type="text"/>	<input type="text"/>	
Daytime Telephone Number (in case we have questions)		
<input type="text"/>	-	<input type="text"/>

**◆ If a Joint or Minor's Account**

Joint/Custodian's First Name	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Social Security Number	Daytime Telephone Number (in case we have questions)	
<input type="text"/>	<input type="text"/>	
Joint/Custodian's First Name	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Social Security Number	Daytime Telephone Number (in case we have questions)	
<input type="text"/>	<input type="text"/>	

## 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)
<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

Correspondence Reference Number (if applicable)	Daytime Telephone Number (in case we have questions)
<input type="text"/>	<input type="text"/>

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