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# Beneficiary Designation or Change Request

**INSTRUCTIONS:** Please complete this form in its entirety. In addition, please be sure to read this entire form prior to completion to avoid any processing delays. By signing this form, you consent to all terms and conditions outlined in this document and reaffirm the terms and conditions in your Account Adoption Agreement.

## SECTION 1 - Account Holder Information

Name:  Account Number:   
 Social Security Number:

## SECTION 2 - Beneficiary Designation

Kingdom Trust requires you to designate a beneficiary for your account who will be the recipient of the assets in your account following your death. If the named beneficiary is a trust, you must provide a copy of the trust agreement to Kingdom Trust. In the event of your death, the balance of your account shall be paid to the primary beneficiaries who survive you in equal shares (or the specified shares, if indicated). If the primary or contingent beneficiary box is not marked for the beneficiary, the beneficiary will be considered to be a primary beneficiary. If none of the primary beneficiaries survives you, the balance of the account shall be paid to the contingent beneficiaries who survive you in equal shares (or in the specified shares, if indicated). If any primary or contingent beneficiary does not survive you, such beneficiary's interest and the interest of such beneficiary's heirs shall terminate completely, and the applicable share for any remaining primary or contingent beneficiary(ies) shall be increased on a pro rata basis. In the event the share percentage for all the beneficiaries who receive funds under this beneficiary designation totals less than 100%, the applicable share(s) of those beneficiaries who receive funds shall be increased on a pro rata basis until the total of all applicable shares equals 100%.

If the named beneficiary is a trust, you must include the full trust documents, where available, with this completed and signed form.

<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	<input type="checkbox"/> Primary <input type="checkbox"/> Contingent
Name: <input type="text"/>	Name: <input type="text"/>	Name: <input type="text"/>
Relationship: <input type="text"/> Share %: <input type="text"/>	Relationship: <input type="text"/> Share %: <input type="text"/>	Relationship: <input type="text"/> Share %: <input type="text"/>
SSN/EIN: <input type="text"/>	SSN/EIN: <input type="text"/>	SSN/EIN: <input type="text"/>
Street Address: <input type="text"/>	Street Address: <input type="text"/>	Street Address: <input type="text"/>
City, State, ZIP: <input type="text"/>	City, State, ZIP: <input type="text"/>	City, State, ZIP: <input type="text"/>
Date of Birth: <input type="text"/>	Date of Birth: <input type="text"/>	Date of Birth: <input type="text"/>

**I am married** (if you are married, reside in a community property state\* and name a primary beneficiary other than your spouse, your spouse is required to sign below to ensure your designation will be effective).

**I am NOT married** (if you marry in the future, reside in a community property state,\* and name a primary beneficiary other than your spouse, you are required to complete a beneficiary change form with spousal consent to ensure your designation will be effective).

\* In the United States, there are nine community property states: Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington and Wisconsin.

Account Holder Signature:   Date:

### ◆ SPOUSAL CONSENT

**I consent to the above beneficiary designations:**

Signature of Spouse:   Date:

(Note: Consent of the Account Holder's spouse is only required for married applicants living in a community property state who designate a beneficiary other than or in addition to the Account Holder's spouse.)

**Disclaimer:** The Account Holder's spouse may have a property interest in the account and the right to dispose of the interest by will. Therefore, Kingdom Trust disclaims any warranty or responsibility as to the effectiveness of the Account Holder's beneficiary designation or as to the ownership of the account after the death of the Account Holder or the Account Holder's spouse. For additional information, please consult your legal advisor.

Kingdom Trust does not provide tax, legal or investment advice. It does not endorse or recommend any agent, company or specific investment. Any information communicated by Kingdom Trust is solely for educational purposes and should not be construed as tax, legal or investment advice. Consultations with tax, legal and investment professionals is advised prior to making any decisions regarding your account.

