

Beneficiary Update



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Mail form to: Thornburg, PO Box 219017, Kansas City, MO 64121

1. Account Information

Account Number	Account Registration		
Social Security or TIN	Email Address		
Address	Phone		
City	State	Zip	Alternate Phone

2. Beneficiary Information

Default arrangement is pro-rata. Please specify if you wish to designate per stirpes.

Beneficiary

A. ☐ Add ☐ Remove B. ☐ Primary ☐ Contingent

Name	Relationship	Percentage
Date of Birth	Social Security or TIN	

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Beneficiary

A. ☐ Add ☐ Remove B. ☐ Primary ☐ Contingent

Name	Relationship	Percentage
Date of Birth	Social Security or TIN	

2. Beneficiary Information (continued)

Beneficiary

A. ☐ Add ☐ Remove B. ☐ Primary ☐ Contingent

Name	Relationship	Percentage
Date of Birth	Social Security or TIN	

3. Spousal Waiver

If you are married, please read the following information that applies to residents of community property or marital property states if spouse is not designated as primary beneficiary. It is the Account Owner's responsibility to determine if this section applies. The Account Owner may need to consult with legal counsel. Neither the Fund nor its Agent are liable for any consequences resulting from a failure of the Account Owner to provide proper spousal consent.

IMPORTANT: This Designation of Beneficiary may have tax or estate planning effects and consequences. If you are married and reside in a community property or marital property state (currently 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. Note that the states listed here may change. See your attorney or tax professional for additional information and advice.

As the spouse of the above-named owner of the account, I hereby consent to the designation of the beneficiary(ies) stated above.

Name of Spouse	Signature of Spouse	Date
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4. Shareholder Authorization Signature

Participant Signature	Date
Signature required to effect the above changes.	