MUNDER

Direct Mail
**The Munder Funds**
P.O. Box 9701
Providence, RI 02940

Overnight Delivery
**The Munder Funds**
101 Sabin Street
Pawtucket, RI 02860

# Transfer On Death (TOD) Registration Request

Please complete this form to establish a Transfer on Death registration on your account. Do not use this form to add or change beneficiary information on any IRA accounts. Only accounts registered to individuals or as joint tenants with rights of survivorship may be designated as TOD accounts. For additional information, please contact Shareholder Services at 800.438.5789.

**PLEASE PRINT IN BLOCK CAPITAL LETTERS**

## 1. ACCOUNT INFORMATION

Please Check One:

☐ New Account (Must be accompanied by a completed Account Application)

☐ Existing Account (Medallion Signature Guarantee required)

Account Number

Owner's First Name | Middle Initial | Last Name

Owner's Social Security Number

Joint Owner's First Name, if applicable | Middle Initial | Last Name

## 2. BENEFICIARY DESIGNATION

Beneficiary's Full Name (Individual or Entity)

Beneficiary's Tax Identification Number | Beneficiary's Date of Birth (mm/dd/yyyy) | Beneficiary's State of Residence

Only **one** beneficiary may be named. Transfer on Death registrations are governed by the Securities Transfer Association (STA) TOD Rules, except as altered, modified, or supplemented by the Munder Funds. The phrase "Subject to STA TOD Rules" in an account registration shall incorporate any such modifications. TOD registrations will only be accepted with respect to shareholders who reside in a state that has adopted the Transfer on Death Registration Act. If the named beneficiary predeceases the registered shareholder(s), the account is treated as an individual account or multiple owner account (as applicable) and the assets of the account belong to the estate of the last surviving shareholder. Minors are not permitted to be named as beneficiaries except to the extent that a custodian, guardian or trustee is also named in the registration. Custodians under the Uniform Transfers to Minors Act may be designated as beneficiaries. Custodians under the Uniform Gifts to Minors Act may NOT be designated as beneficiaries. The name of the beneficiary and the phrase "Subject to STA TOD Rules" must appear in the account registration at all times. No designation such as Lineal Descendants or Lineal Descendants Per Stirpes is permitted.

## 3. SIGNATURE AND SIGNATURE GUARANTEE

By signing below, you revoke any prior beneficiary designation for the account referenced above, and designate the beneficiary named in Section 2. Reserving the right to revoke or change this beneficiary designation by written notice, you acknowledge the designation is effective upon receipt by the Munder Funds. You agree to be bound by the STA TOD Rules, as may be amended by the STA, or altered, modified or supplemented by the Munder Funds. The Munder Funds are not responsible for determining the tax consequences of this designation nor have the Munder Funds provided any advice with respect to legal effect of the TOD registration.

You agree that none of the Munder Funds, the Munder Funds' transfer agent, Munder Capital Management or any of its affiliates, officers, directors or employees will be liable for any loss, expense or cost for acting upon instructions you provided in connection with the transfer upon your death of the balance in the account referenced in Section 1 to the beneficiary listed in Section 2.

Signature of Owner | Date

Signature of Joint Owner (if applicable) | Date

**Medallion Signature Guarantee:** Required for changes to an existing account