

# Transfer on Death (TOD) Registration Request

This form can only be used for accounts that are established as either Individual or Joint Tenants With Rights of Survivorship.

Important: The beneficiaries named on this form will replace any existing beneficiary information listed on your account. You must specify ALL Primary and Contingent Beneficiaries on this form even if you are changing only one beneficiary.

### 1

#### Account information and state of residence

I acknowledge that this account is being established under the Uniform Transfer on Death Security Registration Act ("TOD Act") of the state of residence indicated below, or, if my state of residence has not adopted the uniform TOD Act, I understand that this account will be established under the California TOD Act. Furthermore, I acknowledge that, upon my death, should there be a conflict with applicable state law, the account will be administered in accordance with the terms of this document.

Name of account owner		Name of account co-ow	Name of account co-owner (if applicable)			
Address		City		State	ZIP	
			( )			
Email address*			Daytime phone	;		
State of residence	Account number					

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#### **Beneficiary designation**

We encourage you to consult a professional regarding the tax-law and estate planning implications of your beneficiary designation. All stated percentages must be whole percentages (e.g., 33%, not 33.3%). If the percentages do not add up to 100%, each beneficiary's share will be based proportionately on the stated percentages. When percentages are not indicated, the beneficiaries' shares will be divided equally.

I revoke all previous designations and direct that my American Funds account be distributed upon my death to the designated beneficiary(ies) below. If any beneficiary survives me but fails to survive transfer of his or her entire share, then the remaining portion of such beneficiary's share shall be transferred to such beneficiary's estate.

- **Notes:** Your spouse may need to sign in Section 3. If you wish to name more than one trust or entity, customize your designation or need more space, attach a separate page. Include the name, address, relationship, date of birth or trust, SSN/TIN and percentage for each beneficiary.
  - If you name a trust as beneficiary, provide the full legal name of the trust. Example: "The Davis Family Trust."
  - In the event the beneficiary is a minor, American Funds Service Company® may take instruction to transfer the proceeds to a custodian under the applicable state's Uniform Transfers to Minors Act.
- A. Primary beneficiary(ies): If any designated primary beneficiary(ies) dies before I do, that beneficiary's share will be divided proportionately among the surviving primary beneficiaries unless otherwise indicated. If no primary beneficiaries survive me, assets will be paid to the named contingent beneficiaries, if any.
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	First na	me					MI	Last			Suffix
OR	Name o	of trust or	other entit	у							
	Address	s						City		State	ZIP
	Child	Parent	Spouse	Sibling	Other	Entity or trust	Date of birth	n or trust (mm/dd/yyyy)	SSN/TIN		Whole % only





Address   City   State   ZIP									(continued)	
Child Parent Spouse* Sibling Other Date of birth (mm/dd/yyyy)  SSN Whole  Address City State ZIP  Child Parent Spouse* Sibling Other Date of birth (mm/dd/yyyy)  SSN Whole  Address City State ZIP  Child Parent Spouse* Sibling Other Date of birth (mm/dd/yyyy)  SSN Whole  Contingent beneficiary(ses): If no primary beneficiary survives me, pay my benefits to the following contingent beneficiary(ses). If designated contingent beneficiaries dies before I do, that beneficiary's share will be divided proportionately among the surviving contingent beneficiaries unless otherwise indicated. If no contingent beneficiaries survive me, assets will be paid to my estate.  1. First name MI Last Suf  Address City State ZIP  Child Parent Spouse* Sibling Other Entity or trust Date of birth or trust (mm/dd/yyyy) SSN/TIN Whole  Address City State ZIP  Child Parent Spouse* Sibling Other Date of birth (mm/dd/yyyy) SSN/TIN Whole	Suffix	_ Sut			Last	MI			First name	
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First name  MI Last  Sufficient  Address  City  State  ZIP  Child Parent Spouse* Sibling Other Date of birth (mm/dd/yyyyy)  SSN  Whole  Ortant: Section 2-A must be completed prior to completing Section 2-B.  Contingent beneficiary(ies): If no primary beneficiary survives me, pay my benefits to the following contingent beneficiary(ies). It sesignated contingent beneficiary(ies) dies before I do, that beneficiary's share will be divided proportionately among the surviving ontingent beneficiaries unless otherwise indicated. If no contingent beneficiaries survive me, assets will be paid to my estate.  First name  MI Last  Sufficient  Address  City  State  ZIP  Address  City  State  ZIP	ole % only	Whole		SSN		Date of birth (mm/dd/yyyy)	Other	Spouse* Sibling	Child Parent	
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Contingent beneficiary(ies): If no primary beneficiary survives me, pay my benefits to the following contingent beneficiary(ies). It no primary beneficiary survives me, pay my benefits to the following contingent beneficiary(ies). It no primary beneficiary survives me, pay my benefits to the following contingent beneficiary(ies). It no contingent beneficiary's share will be divided proportionately among the surviving contingent beneficiaries unless otherwise indicated. If no contingent beneficiaries survive me, assets will be paid to my estate.  It is name	ZIP	– ZIF	State		City				Address	
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Address City State ZIP  Child Parent Spouse* Sibling Other Date of birth (mm/dd/yyyy) SSN Whole	ole % only	– ZIF	State		City			other entity	Name of trust or o	
Child Parent Spouse* Sibling Other Date of birth (mm/dd/yyyy) SSN Whole	Suffix		State	d/yyyy) SSN/TIN		Entity or trust Date of bird	Other		Name of trust or o	
	ZIP	Whole	State	d/yyyy) SSN/TIN	h or trust (mm/dd/yy		Other		Address  Child Parent	
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	ole % only	Whole Sur			Last City	MI		Spouse* Sibling	Address Child Parent First name	:. :
Address City State ZIP	oole % only	Whole Suf			Last City	MI  Date of birth (mm/dd/yyyy)	Other	Spouse* Sibling  Spouse* Sibling	Address Child Parent Address Child Parent	2.

<sup>\*</sup>By naming my spouse as a beneficiary, I elect to treat such spouse as a beneficiary while we are married. Effective immediately upon the divorce, annulment or other lawful dissolution of my marriage, the designation shall be null and void, unless after the dissolution of my marriage I affirmatively elect to name my former spouse as my non-spouse beneficiary.





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#### Spousal consent to TOD beneficiary designation — if required

This section is not required if the co-owners are married to each other.

**Note:** If you are married to the account owner (or any account co-owner) and he or she designated a Primary Beneficiary(ies) other than you, please consult your financial professional about the state-law and tax-law implications of this beneficiary designation, including the need for your consent.

I am the spouse of the account owner (or any account co-owner) named in Section 1, and I expressly consent to the beneficiary(ies) designated in Section 2 or attached. I agree to indemnify and hold harmless American Funds Service Company (AFS); each investment company served by AFS; each of the AFS-affiliated companies; and each of their respective directors; trustees; officers; and employees from and against any and all losses and liabilities (including court costs and reasonable attorney's fees) resulting from AFS acting on this *Transfer on Death (TOD) Registration Request*, maintaining this account or transferring assets from this account in accordance with this request.

	X	1 1
Name of account owner's spouse (print)	Signature of spouse	Date (mm/dd/yyyy)
	X	, ,
Name of account co-owner's spouse (print)	Signature of spouse	Date (mm/dd/yyyy)



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#### Your signature

All registered account owners must sign.

By establishing this account, I agree to indemnify and hold harmless American Funds Service Company (AFS); each investment company served by AFS; each of the AFS-affiliated companies; and each of their respective directors; trustees; officers; and employees from and against any and all losses and liabilities (including court costs and reasonable attorney's fees) resulting from AFS acting on this *Transfer on Death (TOD) Registration Request*, maintaining this account or transferring assets from this account in accordance with this request.

This document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.

X			1 1
Signature of account owner		Date	(mm/dd/yyyy)
x			1 1
X Signature of account co-owner		Date	(mm/dd/yyyy)
<b>Louisiana residents only:</b> The account owner's signate must sign below.		vho are not being r	amed as beneficiaries
Sworn to and subscribed before me, this	day of Month	, Year	
in the County of	, State of		
X Signature of notary public			1 1
Signature of notary public		Date com	mission expires (mm/dd/yyyy)
NOTARY: Affix seal here.			
If this form includes a notary signature, it must be n			
Name of witness (print)	Signature of witness		
Name of witness (print)	X Signature of witness		

If mailing, choose the service center for your state. Mail the form to the Indiana Service Center if you live outside the U.S.



American Funds Service Company P.O. Box 6007 Indianapolis, IN 46206-6007

Overnight mail address 12711 N. Meridian St. Carmel, IN 46032-9181



American Funds Service Company P.O. Box 2280 Norfolk, VA 23501-2280

**Overnight mail address** 5300 Robin Hood Rd. Norfolk, VA 23513-2430

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Financial professional upload www.capitalgroup.com/upload

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