Thrivent Financial for Lutherans®
Appleton, Wisconsin • Minneapolis, Minnesota
Thrivent.com • 800-THRIVENT (800-847-4836)

Mutual Funds Beneficiary Designation Instructions

This form is used to:
- Designate the beneficiaries of an IRA, 403b or Coverdell account or change designations currently on file.
- Any new information provided will replace any beneficiary designations currently on file.

Read and understand the instructions before completing this form.
- If this form is incomplete or not legible when returned, your request may be delayed.
- Once this transaction has been processed, it cannot be **reversed**. It may be changed with an additional form.
- Read and understand the entire form and instructions before completing. Questions regarding this form may be directed to the **Customer Interaction Center at: 800-847-4836.**
- Send completed forms:

  Fax to: 866-278-8363
  Or mail to:
  Thrivent Investment Management, Inc.
  PO Box 219348
  Kansas City, MO 64121-9348
- For your own security, do not e-mail the completed forms to Thrivent. E-mailed forms will not be accepted.

Account number(s)
- List **all** fund/account numbers to which these beneficiaries are to be added or updated.
- Only account numbers referenced will be updated.

Name of Investor
List names of all account owners.

Beneficiary Designation
- List full name, relationship, address, Social Security number and date of birth for each beneficiary listed.
  - This information is used to identify and match beneficiary upon inheritance.
  - If more room is needed on any line, clearly indicate "additional information attached" and include a sheet with the required information.
- For multiple beneficiaries, each will inherit equally unless otherwise specified. If they should be split differently, include percentage (%) desired after each name.
- **Primary Beneficiary:** This is the first person/people who will inherit upon death of account owner.
- **First Contingent Beneficiary:** In the event that all primary beneficiaries predecease account owner, inheritance will pass to the first contingent beneficiary/beneficiaries.
- **Secondary Contingent Beneficiary:** In the event that all primary and first contingent beneficiaries predecease account owner, inheritance will pass to the secondary contingent beneficiary/beneficiaries.

Signatures
- **All account owners must sign and date the form.**
- **Spousal Consent signature:** required for any retirement account when the spouse is not the primary beneficiary.
- **Signature of witness:** required for 403(b) retirement plans only