

Beneficiaries—Investments

Use this form to add or change the beneficiaries of your Wiz Investments Account. Type on screen or print out and fill in using CAPITAL letters and black ink. If you need more room for information, make a copy of the relevant page.

Helpful to Know

- You may want to review this document with a tax, financial, or legal advisor
- You can change beneficiaries any time at wizinvestments.com/lets-chat
- This form cancels any existing beneficiary information. Be sure this form includes ALL beneficiaries you want on the account(s)
- To add beneficiaries on accounts, go to wizinvestments.com/lets-chat

1. Account Owner

This phone number may be used if we have questions but will not be used to update your account information

Name	
Phone Number	

2. Beneficiaries

<p>For each beneficiary you list, check a beneficiary type and provide all information, including the full name as evidenced by a government-issued, unexpired document (e.g., driver's license, passport, permanent resident card). If you outlive a beneficiary and you want that beneficiary's share to go to his or her descendants, check "Per stirpes."</p>	<input type="checkbox"/> Spouse <input type="checkbox"/> Non-Spouse <input type="checkbox"/> Trust <input type="checkbox"/> Other Entity	<table border="1"> <tr><td colspan="4">Name</td></tr> <tr><td colspan="4"></td></tr> <tr> <td>Social Security or Tax Payer ID</td> <td>Date of Birth/Trust (MM/DD/YY)</td> <td>Share Percentage</td> <td rowspan="2"><input type="checkbox"/> Per Stirpes</td> </tr> <tr> <td></td> <td></td> <td style="text-align: center;">%</td> </tr> </table>	Name								Social Security or Tax Payer ID	Date of Birth/Trust (MM/DD/YY)	Share Percentage	<input type="checkbox"/> Per Stirpes			%
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3. Contingent Beneficiaries

<p>For each beneficiary you list, check a beneficiary type and provide all information, including the full name as evidenced by a government-issued, unexpired document (e.g., driver's license, passport, permanent resident card). If you outlive a beneficiary and you want that beneficiary's share to go to his or her descendants, check "Per stirpes."</p>	<input type="checkbox"/> Spouse <input type="checkbox"/> Non-Spouse <input type="checkbox"/> Trust <input type="checkbox"/> Other Entity	<table border="1"> <tr><td colspan="4">Name</td></tr> <tr><td colspan="4"></td></tr> <tr> <td>Social Security or Tax Payer ID</td> <td>Date of Birth/Trust (MM/DD/YY)</td> <td>Share Percentage</td> <td rowspan="2"><input type="checkbox"/> Per Stirpes</td> </tr> <tr> <td></td> <td></td> <td style="text-align: center;">%</td> </tr> </table>	Name								Social Security or Tax Payer ID	Date of Birth/Trust (MM/DD/YY)	Share Percentage	<input type="checkbox"/> Per Stirpes			%
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4. Signature and Date

By signing below, you:

- Affirm that the beneficiary information provided on this form replaces any prior beneficiary information that may be on record for the indicated account(s).
- Acknowledge that, if you check “per stirpes,” that any share otherwise payable to a beneficiary shall instead be paid to that beneficiary’s surviving descendants by right of representation if the original beneficiary does not survive the account owner.
- Acknowledge that “per stirpes” creates a category of beneficiaries (for example, the children of a beneficiary), and therefore may end up including individuals not yet born or adopted.
- Acknowledge that listing beneficiaries by name does NOT create a category of beneficiaries, and that if you later want to include other beneficiaries, you will need to submit a new beneficiary form.
- Agree that Wiz Investments has no obligation to locate or notify any

- beneficiary or to independently verify any information submitted by any person claiming an interest in your account.
- Acknowledge that if you do not provide percentages, the account will be divided equally among primary or contingent beneficiaries, as applicable.
- Acknowledge that if you do not properly name a beneficiary, or no beneficiary survives you, your beneficiary will be your spouse or, if you are not married, your estate, in accordance with the rules of succession in the applicable Custodial Agreement.
- Agree that if your beneficiary allocation totals at least 99%, but less than 100% (e.g., 3 named beneficiaries are each assigned a 33% interest in the account), Wiz Investments will assign the unallocated remainder to the first named beneficiary.

- Agree that when your assets are distributed to your beneficiaries, fractional shares that cannot be distributed in accordance with your instructions will instead be given to the beneficiary receiving the largest percentage of the account’s assets or, if each beneficiary is receiving an equal percentage, to the last paid beneficiary.
- Acknowledge that Wiz Investments has no responsibility for the application of assets distributed to beneficiaries.
- Acknowledge that any portion of your investments inherited by your surviving spouse will become your spouse’s investment, and any portion inherited by other beneficiaries will cease to be investment assets and will be treated as income to those beneficiaries.
- Acknowledge that Wiz Investments reserves the right not to make any payments until at least 30 days after the original account owner’s death.
- Acknowledge that if you do not properly name a beneficiary, or no beneficiary survives you, the account will go to your estate as provided in the applicable Wiz Investments Custodial Agreement.

PRINT OWNER/AUTHORIZED INDIVIDUAL NAME	
OWNER/AUTHORIZED INDIVIDUAL SIGNATURE	DATE MM/DD/YY
X	X

Did you sign the form

Send the ENTIRE form to Wiz Investments. You will receive a “Revised Account Profile” confirming your updates.
 Questions?
 Go to WizInvestments.com/lets-chat or call 918-605-7934

Regular mail:
 806 Portwalk Pl.
 Redwood City. CA 94065