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# TRANSFER ON DEATH (TOD) REGISTRATION FORM

(for Advisor Services Clients Only)

## A GENERAL INFORMATION

Transfer on death is a form of account registration which allows an individual who is sole owner of a security or one of multiple owners in joint tenancy to register the security as a beneficiary registration. A beneficiary registration provides that upon the death of the owner, ownership of the security will transfer to a designated beneficiary without going through any probate or testamentary action. A beneficiary may be cancelled or changed by the owner(s) without the consent of the beneficiary. Please note that under the transfer on death with joint tenants, if one tenant is deceased, all shares becomes the surviving tenant's. Therefore, the surviving tenant will need to re-register the account to reflect a new Transfer on Death beneficiary.

## B DESIGNATION

Complete this form to designate your account to be registered for Transfer on Death (TOD) to a beneficiary. **NOTE:** For a *new* account, complete Sections 1 and 2. If you are changing registration for an *existing* account, complete Sections 1 and 3 and obtain a signature guarantee.

**Section 1: Beneficiary Designation:** *(This information will be part of the legal registration and will appear on statements.)*

Name of Beneficiary

Date of Birth

Street Address

City /State/Zip

Social Security Number

Relationship to Account Owner(s)

Account Owner's Name

Millennium Account No.

**Section 2: New Account Registration:** *(Complete and return this form with your Custody Agreement.)*

Account Owner's Name

Account Owner's Social Security Number

Joint Account Owner's Name

Joint Account Owner's Social Security Number

Street Address

City/State/Zip

**Section 3: Owner Information:** *(Complete this section to change an existing registration. Please note that the signatures must be signature guaranteed.)*

Account Owner's Name

Account Owner's Social Security Number

Joint Account Owner's Name

Joint Account Owner's Social Security Number

Street Address

City/State/Zip

Account Number

Present Owner's Signature *(Exactly as registered)*

Present Joint Owner's Signature *(Exactly as registered)*

[Medallion Signature Guarantee Stamp Here]

*A Medallion Signature Guarantee may be obtained from an authorized officer at a brokerage firm, bank or other financial institution. Certification by a notary public is not a substitute for a signature guarantee.*