

The Elite Group of Mutual Funds Beneficiary Designation Form

Shareholder Name: _____ Phone: _____ Date: _____

Fund Name: _____ Account Number: _____

Primary Beneficiary (ies)

Name: _____ Relationship: _____ Date of Birth: _____
Address: _____ Percent Share: _____

Name: _____ Relationship: _____ Date of Birth: _____
Address: _____ Percent Share: _____

Name: _____ Relationship: _____ Date of Birth: _____
Address: _____ Percent Share: _____

Secondary Beneficiary (ies)

Name: _____ Relationship: _____ Date of Birth: _____
Address: _____ Percent Share: _____

Name: _____ Relationship: _____ Date of Birth: _____
Address: _____ Percent Share: _____

Spousal Consent

This section should be reviewed if either the trust or the residence of the IRA holder is located in a community of marital Property State and the IRA holder is married. Due to the important tax consequences of giving up one's community property interest individuals signing this section should consult with a competent tax or legal advisor.

Current Marital Status (please check appropriate box)

I am not married - I understand that if I become married in the future, I must complete a new IRA Designation of Beneficiary form.

I am married - I understand that if I choose to designate a primary beneficiary other than my spouse, my spouse must sign below.

Signature of Spouse: _____ Date: _____

Signature of Witness: _____ Date: _____

I am the spouse of the above named IRA holder. I acknowledge that I have received a fair and reasonable disclosure of my spouse's property and financial obligations. Due to the important tax consequences of giving up my interest in the IRA, I have been advised to see a tax professional.

I hereby give the IRA holder any interest I have in the funds or property deposited in the IRA and consent to the beneficiary designation(s) indicated above. I assume full responsibility for any adverse consequences that may result. No tax or legal advice was given to me by the Custodian.

IRA Accountholder Signature: _____ Date: _____