

# Designation of Transfer on Death (TOD) Beneficiary



P.O. Box 219967 | Kansas City, MO 64121  
allspringglobal.com

Complete this form to establish or change the TOD beneficiary designation on your Allspring Funds account. **Note:** Only accounts registered as individual, joint tenant (with rights of survivorship or tenants by the entirety) may designate a TOD beneficiary. Do not list any IRAs on this form. If you have questions, call **1-800-222-8222**.

## I. Account information (please print)

Name of account owner (first, middle initial, last) Social Security number

Name of joint account owner (first, middle initial, last) Social Security number

**Update my existing Allspring Funds account(s).** List the fund and account number(s) below.

Fund and account number Fund and account number

Fund and account number Fund and account number

**Update my new Allspring Funds account(s).** List the fund name(s) below and submit this form with your New Account Application.

Fund name Fund name

Fund name Fund name

## 2. Primary beneficiary(ies)

Primary beneficiary: Individual(s) or entity(ies) who will receive the funds upon the death of all account owners. To name additional primary beneficiaries, include all information in this section on a separate sheet.

Beneficiary(ies) must be designated by name and the sum of the percentages for all primary beneficiaries must equal 100%. Unless noted, we will assume equal distribution among primary beneficiaries.

Name of beneficiary (first, middle initial, last) or entity Name of beneficiary (first, middle initial, last) or entity

Mailing address Mailing address

City State ZIP code City State ZIP code

Beneficiary's Social Security/taxpayer ID number Beneficiary's Social Security/taxpayer ID number

Date of birth (mm/dd/yyyy) Relationship Percentage % Date of birth (mm/dd/yyyy) Relationship Percentage %

## 3. Secondary beneficiary(ies)

Secondary beneficiary: Individual(s) or entity(ies) who will receive the funds upon the death of all account owners if all primary beneficiaries predeceased all account owners.

Beneficiary(ies) must be designated by name and the sum of the percentages for all secondary beneficiaries must equal 100%. Unless noted, we will assume equal distribution among secondary beneficiaries. To establish designations of lineal descendants or lineal descendants per stirpes, print the designation next to the name of each secondary beneficiary (consult with your estate planning attorney before indicating this option).

To name additional secondary beneficiaries, include all information in this section on a separate sheet.



Name of beneficiary (first, middle initial, last) or entity			Name of beneficiary (first, middle initial, last) or entity		
Mailing address			Mailing address		
City	State	ZIP code	City	State	ZIP code
Beneficiary's Social Security/taxpayer ID number			Beneficiary's Social Security/taxpayer ID number		
Date of birth (mm/dd/yyyy)	Relationship	Percentage %	Date of birth (mm/dd/yyyy)	Relationship	Percentage %

## 4. Signatures

I understand that this TOD beneficiary designation shall replace any previous TOD beneficiary designation(s) I have made for the Allspring Funds accounts listed in section 1 of this form. I acknowledge that this designation is effective upon receipt in good order by the fund's transfer agent and will remain in effect until I deliver written notice of a change or revocation of beneficiary(ies) to the fund's transfer agent. I agree to be bound by the SS&C GIDS, Inc. TOD Rules, which SS&C GIDS, Inc. may amend from time to time or may be altered, modified, or supplemented by Allspring Funds. I further understand that Allspring Funds reserves the right, at any time without prior notice, to suspend, limit, modify, or terminate the TOD registration.

I, my successors and assigns, do hereby agree to indemnify and hold harmless Allspring Funds, Allspring Funds Management, LLC, their affiliates, and subcontractors—as well as the officers, directors, employees, and agents of these entities—from and against any and all liabilities, claims, losses, and expenses (including reasonable attorneys' fees) arising out of or in connection with the transfer upon my death of the balance in the account(s) referenced in section 1 to the beneficiary(ies) listed on this form.

All account owners must sign and date this form to complete this request.

	Signature of account owner	Print name	Date
	Signature of joint account owner	Print name	Date

## 5. Transfer on death (TOD) limitations and modifications

TOD registrations are governed by the fund's transfer agent, SS&C GIDS, Inc., except as altered, modified, or supplemented by Allspring Funds. The phrase "Subject to TOD Rules" in an account registration shall incorporate the modifications adopted by Allspring Funds. The following guidelines are currently in effect:

- The TOD registration requested on this application complies with the applicable laws of the state of Massachusetts. If there is a dispute regarding the right of a TOD beneficiary to receive assets pursuant to this TOD registration, Allspring Funds cannot assure you that the party or court hearing the dispute will apply Massachusetts law when making its determination.
- The designation Payable on Death (POD) may be substituted for TOD at the account owner's request.
- Beneficiary designations will only apply to the account(s) as designated in section 1 of this form and any new accounts established by subsequent exchange from one of the designated TOD beneficiary accounts. In the event that a named primary beneficiary predeceases all account owners, the deceased beneficiary's designated portion of the account will be allocated among the surviving primary beneficiaries on a pro rata basis, except for designations of lineal descendants or lineal descendants per stirpes. If all primary beneficiaries predecease all account owners, and lineal descendants or lineal descendants per stirpes were not designated, then the assets will be allocated among the designated secondary beneficiaries.
- You can change your designation of beneficiary at any time by:
  - submitting a new Designation of Transfer on Death (TOD) Beneficiary form;
  - submitting a letter of instruction detailing the same information requested on this form; or
  - submitting a letter of instruction to revoke the beneficiary designation.
- A TOD registration may not be changed or revoked by will, codicil, or telephone conversation.
- For information regarding lineal descendants please visit [allspringglobal.com](http://allspringglobal.com).
- In the event of divorce and a former spouse is a designated beneficiary at the time of death of the account owner, applicable state law may dictate that this designation is automatically revoked unless the designation was made after the divorce.
- The legend "Subject to TOD Rules" must appear in the account registration at all times. For example:  
 John H. Smith &  
 Mary M. Smith JT Ten  
 Subject to TOD Rules  
 Address  
 City, State ZIP