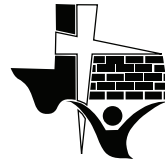


# BENEFICIARY/BEQUEST DESIGNATION



Texas District Church Extension Fund  
1221 Satellite View, Round Rock, TX 78665  
Phone 1-888-951-1233  
Fax 512-535-1605  
TexasCEF.org  
facebook.com/texascef

## STEP 1: Customer Information

First	Initial	Last	Investment Number(s)
Address			
City	State	Zip	
Home Phone	Office or Cell Phone	E-mail	

## STEP 2: Beneficiary Designation

This is only available for individual or joint tenants with right of survivorship (JTWROS) investments. It is **not** for custodial investments, tenants in common, trusts or businesses. List the person(s) or organization(s) such as the ministry of Texas District CEF, or a congregation to whom you want to transfer your investment(s) at your death (or at the death of the last surviving owner). If you name an LCMS-related ministry, simply provide the name, city, state and percentage amount. Information on this form will supersede any previous beneficiary designations. **The total percentages must equal 100%.**

- |         |               |                        |            |
|---------|---------------|------------------------|------------|
| Name    | Date of Birth | Social Security Number |            |
| Address |               | Relationship           |            |
| City    | State         | Zip                    | Percentage |
- |         |               |                        |            |
|---------|---------------|------------------------|------------|
| Name    | Date of Birth | Social Security Number |            |
| Address |               | Relationship           |            |
| City    | State         | Zip                    | Percentage |
- |         |               |                        |            |
|---------|---------------|------------------------|------------|
| Name    | Date of Birth | Social Security Number |            |
| Address |               | Relationship           |            |
| City    | State         | Zip                    | Percentage |
- |         |               |                        |            |
|---------|---------------|------------------------|------------|
| Name    | Date of Birth | Social Security Number |            |
| Address |               | Relationship           |            |
| City    | State         | Zip                    | Percentage |

### STEP 3: Spousal Consent (complete only if Spouse is not an owner)

I am the spouse of the investment holder named above. I give to the investment holder any interest I have in the funds deposited in this investment. Therefore, I agree to my spouse's naming of a primary beneficiary other than myself. I acknowledge that I have received a fair and reasonable disclosure of my spouse's property and financial obligations. I also acknowledge that I shall have no claim whatsoever against Texas District CEF for any payment to my spouse's named beneficiary(ies).

\_\_\_\_\_  
Signature of Spouse

\_\_\_\_\_  
Date

### STEP 4: Authorization

I/We, being all of the owner(s) of the Texas CEF investment(s), acknowledge that we have read and fully understand the instructions printed below and hereby request Texas CEF to register the investment(s) in beneficiary form, as directed above. I/We understand that I/we may change or revoke this Beneficiary/Bequest Form designation at any time. I/We understand that the beneficiaries shall receive the investment subject to all of the terms contained in this form, the instructions, and on the note. I/We also understand and agree that this form and the "Pay on Death" (POD) designation to be stated on the investment(s) are binding upon my/our heirs, beneficiaries, and legal representatives at my/our death(s) and shall be construed and applied in accordance with the Non-Probate Transfers Law of Texas.

\_\_\_\_\_  
Signature of Owner

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Joint Owner

\_\_\_\_\_  
Date

### Instructions

- This form allows the owner(s) of investment(s) issued by Texas District Church Extension Fund ("Texas CEF") to transfer these investment(s) to other individuals and/or organizations of the Synod ("the beneficiaries") upon their death. Organizations of The Lutheran Church—Missouri Synod may be named as beneficiaries as well as individuals. Please list selected individuals and/or organizations on the spaces provided.
- The owner(s) may designate one or more beneficiaries to whom they want to transfer their investment(s) at his or her death (or the death of the last surviving owner). When death occurs, the designated beneficiary(ies) will be entitled to the investment, as its new owner(s). If only one beneficiary is designated, that beneficiary shall be entitled to the investment on the death of the owner(s). If more than one beneficiary is designated, those beneficiaries that survive the owner(s) will each own that percentage of the investment that the owner(s) designates upon the death of the owner(s), and if a beneficiary dies, that deceased beneficiary's share will be allocated among the surviving beneficiaries in the proportion that the surviving beneficiaries' designated shares bear to each other. Each investment will be changed to state, following your name(s) as owner(s): "POD (name[s] of beneficiaries), no LDPS, as joint tenants with right of survivorship." The use of the phrase "no LDPS" means that if a named beneficiary has predeceased the owner(s), his or her share shall be transferred to the surviving beneficiaries, and not to the descendants of the deceased beneficiary. If only one beneficiary is named and predeceases the owner(s), the property will be transferred to the owner's or the last surviving owner's estate.
- In order to make the designation, all owners of the investment(s) must sign this form. If the spouse of any owner is not also an owner of the investment(s), that spouse must complete the Spousal Consent.

- This form will not be effective until it is signed by all owners.
- If you wish to name more than four beneficiaries, call toll-free, 888-951-1233, option 1 for assistance.
- Beneficiaries may be changed or revoked by the owner(s) at any time and naming beneficiaries does not affect the owner(s) rights to interest payments or to redeem the note(s) at maturity.
- POD (Payable on Death): On the death of the last owner of the investment, ownership of the investment passes to the POD beneficiary(ies) of the investment. The investment is not part of the decedent's estate.
- Please return your note certificate to Texas CEF for reprinting.

### Definitions

- **Individual Investment:** The investor owns the investment. On the death of the investor ownership of the investment passes as a part of the investor's estate under the investor's will or by intestacy.
- **Joint Tenants with Right of Survivorship Investment:** The investors own the investment in proportion to their net contributions. Texas CEF may pay any sum in the investment to any owner at any time. On the death of an investor, the investor's ownership of the investment passes to the surviving investor(s).

Through investments from Texas District LCMS congregations and their members, Church Extension Fund will be the preferred financial resources partner for district ministries focused on multiplying followers of Jesus.