SIMPLE IRA Beneficiary Designation

Print Form

J.P.Morgan Asset Management

Please write your plan ID number in box provided.

Customer Service: 1-877-SMPLONE

Please complete, sign and return this form to J.P. Morgan Funds, attention: DST Retirement Solutions, PO Box 219099, Kansas City, MO 64121-9099. If you have questions, please call Investor Services at (877) 767-5663.

1. Personal Information

First Name ______ MI ______ Last ______

Street address ______

Suite/Apartment ______ City ______ State ______ Zip code ______

Residential/legal address (required if different from above) ______

Suite/apartment ______ City ______ State ______ Zip code ______

Social Security Number ______ Daytime phone ______

2. Designation of Beneficiary

Please identify beneficiaries for your J.P. Morgan Funds SIMPLE IRA account.

☐ Check here if you have additional beneficiary designations.
Please attach a separate sheet of paper and include the information below along with your signature.

I hereby designate the following person(s) to receive the balance of my SIMPLE IRA account(s) upon my death. If I have designated more than one person, the amount distributed is to be divided equally among designated persons unless otherwise indicated by a "percentage of distribution." If any beneficiary predeceases me, his share is to be divided among the beneficiaries who survive me in the relative proportion assigned to each such surviving beneficiary. I understand that if I do not designate a beneficiary for my SIMPLE IRA, my surviving spouse will be my beneficiary, unless I have no surviving spouse, in which event my SIMPLE IRA will go to my estate. If I designated a beneficiary which is a trust, I have indicated the name, trustee's name, address and date of the trust. I reserve the right to change my beneficiary(ies) by written notice to J.P. Morgan Funds IRA custodian. Please note: If you reside in a state with community or marital property laws, you are married, and you wish to name a person(s) other than or in addition to your spouse as the beneficiary, you need to obtain your spouse's signature (see section 3).

Primary beneficiary(ies)

1. Name of beneficiary/trust ______

Name of trustee (if applicable) ______

Date of Birth (MMDDYYYY) ______ Percentage of distribution ______ % Relationship ______

Social Security Number ______ OR Tax ID Number ______

2. Name of beneficiary/trust ______

Name of trustee (if applicable) ______

Date of Birth (MMDDYYYY) ______ Percentage of distribution ______ % Relationship ______

Social Security Number ______ OR Tax ID Number ______

3. Name of beneficiary/trust ______

Name of trustee (if applicable) ______

Date of Birth (MMDDYYYY) ______ Percentage of distribution ______ % Relationship ______

Social Security Number ______ OR Tax ID Number ______

2. Designation of Beneficiary (continued)

Secondary beneficiary(ies)

1. Name of beneficiary/trust

Name of trustee (if applicable)

Date of Birth (MMDDYYYY) Percentage of distribution % Relationship

Social Security Number OR Tax ID Number

2. Name of beneficiary/trust

Name of trustee (if applicable)

Date of Birth (MMDDYYYY) Percentage of distribution % Relationship

Social Security Number OR Tax ID Number

3. Name of beneficiary/trust

Name of trustee (if applicable)

Date of Birth (MMDDYYYY) Percentage of distribution % Relationship

Social Security Number OR Tax ID Number

3. Signature

X____

Signature of owner

____

Date

X____

Spousal signature (if applicable - see section 2.)

____

Date

Susan J. Sherman

Accepted by J.P. Morgan Funds IRA custodian: authorized signature

Please mail your investment and/or checks and your signed application to:

Mailing address:
J.P. Morgan Funds
Attn. DST Retirement Solutions
P.O. Box 219099
Kansas City, MO 64121-9099

Overnight mail:
J.P. Morgan Funds
Attn. DST Retirement Solutions
430 W 7th Street Suite 219099
Kansas City, MO 64105-1047