IRA Beneficiary Designation

J.P.Morgan
ASSET MANAGEMENT

Please write account number in box provided.

Shareholder Services: 1-800-480-4111
Internet: www.jpmorganfunds.com

This form should be used to designate a beneficiary for your JPMorgan Funds IRA account. If you wish to designate a beneficiary for your non-qualified account please use the Transfer on Death form. Please complete, sign and return this form to JPMorgan Funds, PO Box 219143, Kansas City, MO 64121-9143. Incomplete information may delay the processing of your application.

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 JPMorgan Funds IRA account.

I hereby designate the following person(s) to receive the balance of my 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 IRA, my surviving spouse will be my beneficiary, unless I have no surviving spouse, in which event my 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 JPMorgan 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).**

A **primary beneficiary** is a person who will receive a specified share of your assets upon your death. A **contingent beneficiary** is a person who will receive a specified share of your assets only if all primary beneficiaries named here pass away before you.

Name of beneficiary/trust ____

Name of trustee (if applicable) ____

☐ Primary Beneficiary or ☐ Contingent Beneficiary Percentage of distribution ____ %

Date of Birth (MMDDYYYY) ____ Relationship ____

Social Security Number ____ OR Tax ID Number ____

Name of beneficiary/trust ____

Name of trustee (if applicable) ____

☐ Primary Beneficiary or ☐ Contingent Beneficiary Percentage of distribution ____ %

Date of Birth (MMDDYYYY) ____ Relationship ____

Social Security Number ____ OR Tax ID Number ____

2. Designation of Beneficiary (continued)

Name of beneficiary/trust

Name of trustee (if applicable)

☐ Primary Beneficiary or ☐ Contingent Beneficiary Percentage of distribution %

Date of Birth (MMDDYYYY) Relationship

Social Security Number OR Tax ID Number

Name of beneficiary/trust

Name of trustee (if applicable)

☐ Primary Beneficiary or ☐ Contingent Beneficiary Percentage of distribution %

Date of Birth (MMDDYYYY) Relationship

Social Security Number OR Tax ID Number

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

3. Signature

X_____ _____

Signature of owner **Date**

X_____ _____

Spousal signature **Date**
(if applicable based on community or marital property laws - see section 2.)

_____

Accepted by JPMorgan Funds IRA custodian: authorized signature

Please return this form and/or your investment check and signed application to:

Mailing address:
J.P. Morgan Funds
PO Box 219143
Kansas City, MO 64121-9143

Overnight mail:
J.P. Morgan Funds
801 Pennsylvania Ave
Suite 219143
Kansas City, MO 64105-1307

Form can be faxed to:
1-816-374-7416

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