

Trust Beneficiary Disclosure

Name of Trust:

Beneficiary:

Primary

Contingent

Full Legal Name

Relationship

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Date of Birth (mm/dd/yyyy)

Social Security/Tax ID Number

Percentage

tastyworks.

Beneficiary Address:

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Street 1

Street 2

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City

State

Postal Code

Country

Is this Beneficiary replacing an existing beneficiary previously disclosed to

tastyworks?

No

Yes; terminated beneficiary information listed below

Full Legal Name

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Date of Birth (mm/dd/yyyy)

Tax ID Number

Percentage

I understand that it is my responsibility as the Primary Account holder to provide true and current trust settlor/grantor information and to maintain the accuracy of said information for the duration of the account so long as I am the Primary Account Holder on record with tastyworks.

Trustee Signature

Date

Email completed forms to accounts@tastyworks.com for processing