

Virtus Mutual Funds PO Box 534470 Pittsburgh, PA 15253-4470

403(b) Custodial Account Beneficiary Designation Form

For assistance, please contact us at 800-243-1574 or visit our website at Virtus.com

1. Important Information

Complete this form to change your current Primary or Contingent Designated Beneficiary(ies). The share percentage must equal 100% for all Primary Beneficiaries and 100% for all Contingent Beneficiaries. If neither the Primary nor the Contingent Beneficiary box is checked, the beneficiary will be deemed to be a Primary Beneficiary.

Name		U.S. Social Security Number	
Address		Email Address	
City, State, ZIP Code		Fund and Account Number(s)	
to replace a	ig the preceding box, I authorize Virtus Mutual Funds any conflicting information and/or add any missing to my account records, with regard to the address, ess and telephone numbers provided in this section.	Mobile Telephone Number	Evening Telephone Number
3. Participant	's Designation		
I hereby revoke	any previous beneficiary designation.		
have specified of	Beneficiaries who survive me in equal shares (or otherwise, if I name multiple Primary Beneficiaries that percentage will be divided proportionately ar	and a beneficiary does not s	urvive me, such interest is
have specified of beneficiary does remaining Conti- concerning the Custodian. If I of the beneficiary of many beneficiary of many PER STIRPES provided in good	otherwise, if no Primary Beneficiary survives me as not survive me, such interest is terminated and ingent Beneficiaries. If I name a beneficiary that Trust to the Custodian. I understand that I may od not designate a beneficiary, or if all designated of my custodial account. If I do not have a survivity custodial account. BENEFICIARY DESIGNATIONS The Custodian d order by the estate/executor with regard to the	and I have named multiple Conthat percentage will be divided as a Trust, I understand that I in thange my beneficiaries at any I beneficiaries predecease meang spouse at the time of my dishall accept as complete and	ntingent Beneficiaries and a d proportionately among the must provide certain information of time by giving written notice to the e, my surviving spouse will become leath, my estate will become the accurate all written instructions
have specified of beneficiary does remaining Conti- concerning the Custodian. If I of the beneficiary of beneficiary of m	otherwise, if no Primary Beneficiary survives me as not survive me, such interest is terminated and ingent Beneficiaries. If I name a beneficiary that Trust to the Custodian. I understand that I may codo not designate a beneficiary, or if all designated of my custodial account. If I do not have a survivity custodial account. BENEFICIARY DESIGNATIONS The Custodian	and I have named multiple Conthat percentage will be divided as a Trust, I understand that I in thange my beneficiaries at any I beneficiaries predecease meang spouse at the time of my dishall accept as complete and	ntingent Beneficiaries and a d proportionately among the must provide certain information of time by giving written notice to the e, my surviving spouse will become leath, my estate will become the accurate all written instructions
have specified of beneficiary does remaining Conticoncerning the Custodian. If I of the beneficiary of mercent per stirres provided in good Primary, or	otherwise, if no Primary Beneficiary survives me as not survive me, such interest is terminated and ingent Beneficiaries. If I name a beneficiary that Trust to the Custodian. I understand that I may od not designate a beneficiary, or if all designate of my custodial account. If I do not have a survivity custodial account. BENEFICIARY DESIGNATIONS The Custodian d order by the estate/executor with regard to the	and I have named multiple Conthat percentage will be divided as a Trust, I understand that I rehange my beneficiaries at any I beneficiaries predecease meang spouse at the time of my dishall accept as complete and dentification of the beneficiaries	ntingent Beneficiaries and a d proportionately among the must provide certain information of time by giving written notice to the e, my surviving spouse will become leath, my estate will become the accurate all written instructions es and the allocations thereto.
have specified of beneficiary does remaining Conticoncerning the Custodian. If I of the beneficiary of mediciary of medici	otherwise, if no Primary Beneficiary survives me as not survive me, such interest is terminated and ingent Beneficiaries. If I name a beneficiary that Trust to the Custodian. I understand that I may od not designate a beneficiary, or if all designated of my custodial account. If I do not have a survivity custodial account. BENEFICIARY DESIGNATIONS The Custodian d order by the estate/executor with regard to the Name Address City	and I have named multiple Conthat percentage will be divided as a Trust, I understand that I represented that I have a represented that I have a represented that I have I ha	ntingent Beneficiaries and a d proportionately among the must provide certain information of time by giving written notice to the e, my surviving spouse will become leath, my estate will become the accurate all written instructions es and the allocations thereto. Relationship to Participant
have specified of beneficiary does remaining Conticoncerning the Custodian. If I of the beneficiary of mediciary of medici	otherwise, if no Primary Beneficiary survives me as not survive me, such interest is terminated and ingent Beneficiaries. If I name a beneficiary that Trust to the Custodian. I understand that I may odo not designate a beneficiary, or if all designated of my custodial account. If I do not have a survively custodial account. BENEFICIARY DESIGNATIONS The Custodian d order by the estate/executor with regard to the Name Address	and I have named multiple Conthat percentage will be divided as a Trust, I understand that I represented tha	ntingent Beneficiaries and a d proportionately among the must provide certain information of time by giving written notice to the e, my surviving spouse will become leath, my estate will become the accurate all written instructions es and the allocations thereto. Relationship to Participant Percentage
have specified of beneficiary does remaining Conticoncerning the Custodian. If I of the beneficiary of mercent of the beneficiary of the beneficiar	otherwise, if no Primary Beneficiary survives me as not survive me, such interest is terminated and ingent Beneficiaries. If I name a beneficiary that Trust to the Custodian. I understand that I may od not designate a beneficiary, or if all designated of my custodial account. If I do not have a survivity custodial account. BENEFICIARY DESIGNATIONS The Custodian d order by the estate/executor with regard to the Name Address City er-stirpes designation	and I have named multiple Conthat percentage will be divided as a Trust, I understand that I represented by a peneficiaries at any I beneficiaries predecease meang spouse at the time of my dishall accept as complete and dentification of the beneficiaries. Social Security Number Date of Birth State	ntingent Beneficiaries and a d proportionately among the must provide certain information of time by giving written notice to the must provide certain information of time by giving written notice to the provide provide accurate all written instructions accurate all written instructions and the allocations thereto. Relationship to Participant Percentage ZIP Code
have specified of beneficiary does remaining Conticoncerning the Custodian. If I of the beneficiary of mercent of the beneficiary of the be	otherwise, if no Primary Beneficiary survives me as not survive me, such interest is terminated and ingent Beneficiaries. If I name a beneficiary that Trust to the Custodian. I understand that I may od not designate a beneficiary, or if all designated of my custodial account. If I do not have a survivity custodial account. BENEFICIARY DESIGNATIONS The Custodian d order by the estate/executor with regard to the Name Address City	and I have named multiple Conthat percentage will be divided as a Trust, I understand that I represented tha	ntingent Beneficiaries and a d proportionately among the must provide certain information of time by giving written notice to the e, my surviving spouse will become leath, my estate will become the accurate all written instructions es and the allocations thereto. Relationship to Participant Percentage
have specified of beneficiary does remaining Conticoncerning the Custodian. If I of the beneficiary of more per STIRPES provided in good Primary, or Contingent Apply a per Primary, or Primary, or Primary, or Contingent	otherwise, if no Primary Beneficiary survives me as not survive me, such interest is terminated and ingent Beneficiaries. If I name a beneficiary that Trust to the Custodian. I understand that I may od not designate a beneficiary, or if all designated of my custodial account. If I do not have a survivity custodial account. BENEFICIARY DESIGNATIONS The Custodian d order by the estate/executor with regard to the Name Address City er-stirpes designation	and I have named multiple Conthat percentage will be divided as a Trust, I understand that I represented by a peneficiaries at any I beneficiaries predecease meang spouse at the time of my dishall accept as complete and dentification of the beneficiaries. Social Security Number Date of Birth State	ntingent Beneficiaries and a d proportionately among the must provide certain information of time by giving written notice to the must provide certain information of time by giving written notice to the provide provide accurate all written instructions accurate all written instructions and the allocations thereto. Relationship to Participant Percentage ZIP Code

3. Participant	's Designation, continued	d.				
☐ Primary, or ☐ Contingent	Name	Social Security Nu	mber Relationship t	o Participant		
	Address	Date of Birth	Percentage			
	City	State	ZIP Code			
☐ Apply a pe	City er-stirpes designation	State	ZIP Code			
☐ Primary, or						
☐ Contingent	Name	Social Security Nu	mber Relationship t	o Participant		
	Address	Date of Birth	Percentage			
	City	State	ZIP Code			
	er-stirpes designation					
	e check here if you have atta nations. Include the date an	iched a separate sheet with additio d your signature.	nal primary or contingent b	eneficiary		
	y Property Disclaimer					
		narty States: The Participant's Spous	se may have a property intere	est in the account		
Disclaimer for Community and Marital Property States : The Participant's Spouse may have a property interest in the account and the right to dispose of the interest by will. Therefore, any sponsors, issuers, depositories and other persons or entities associated with the investments and the Custodian specifically disclaim any warranty as to the effectiveness of the Participant's beneficiary designation or as to the ownership of the account after the death of the Participant's Spouse. For additional						
	ase consult your legal advisor					
		ent is required in community property or than, or in addition to, the spouse.				
		must sign the consent below.	- F			
I hereby conser deposited in this		n of beneficiary above. I give to the P	articipant any interest I have	in the funds		
deposited in this	s account.					
Spouse Print Nan	ne	Spouse Signature	 			
		epeace eignature	Bato			
5. Participant						
for my investme agree that I am expressly confir and their affiliate whatsoever (wh	ent decisions. I agree that I ne not to rely on any information m, and by signing below, I acl es, has made or is making a re	Funds shall be considered to be or is sed to make my own decisions, with w Virtus Mutual Funds is providing as a knowledge, that none of Virtus Mutual ecommendation, or has provided or is or is giving any advice in a fiduciary c s.	hatever third-party advice I w dvice that is a primary basis t Funds, their distributor, their providing investment advice	rish to obtain, and I for my decisions. I transfer agent, of any kind		
IMPORTANT: This Beneficiary Designation will be considered recorded and in effect when it is received in good order and having been sent before the participant's death. Any beneficiary designation that does not comply with the custodial guidelines outlined in the Participants Designation section above will be rejected and returned to the participant. The Custodian will not accept beneficiary contingencies that are applied to either Primary or Contingent beneficiary designations. The Custodian, Virtus Mutual Funds and their employees, officers, directors/trustees and agents will not be responsible for any action taken with regard to an inheritance claim paid before a beneficiary designation request is received in good order and recorded to the account. In addition, if naming a trust or an estate as a primary or contingent beneficiary the Custodian will pay the inheritance proceeds directly to the trust or estate but not the underlying beneficiaries of said trust or estate.						
and conditions	set forth in the applicable do	ree that (1) the account(s) and this Be ocumentation relating to Virtus Mutu- nt agreements, and (2) all prior benefi	al Funds and the account(s)), including without		
	an active participant in an Em	pployer's 403(b) plan, you should prov				
Print Name		Signature	Date			