

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.

2. Participant Information

Name	U.S. Social Security Number	Daytime Telephone Number
Address	Email Address	
City, State, ZIP Code	Fund and Account Number(s)	

3. Participant's Designation

I hereby revoke any previous beneficiary designation.

In the event of my death, the balance in the account shall be paid to the Primary Beneficiaries who survive me in equal shares (or in the specified shares, if indicated). If none of the Primary Beneficiaries survive me, the balance in the account shall be paid to the Contingent Beneficiaries who survive me in equal shares (or in the specified shares, if indicated). I understand that, unless I have specified otherwise, if I name multiple Primary Beneficiaries and a beneficiary does not survive me, such interest is terminated and that percentage will be divided proportionately among the remaining Primary Beneficiaries. Similarly, unless I have specified otherwise, if no Primary Beneficiary survives me and I have named multiple Contingent Beneficiaries and a beneficiary does not survive me, such interest is terminated and that percentage will be divided proportionately among the remaining Contingent Beneficiaries. If I name a beneficiary that is a Trust, I understand that I must provide certain information concerning the Trust to the Custodian. I understand that I may change my beneficiaries at any time by giving written notice to the Custodian. If I do not designate a beneficiary, or if all designated beneficiaries predecease me, my surviving spouse will become the beneficiary of my IRA. If I do not have a surviving spouse at the time of my death, my estate will become the beneficiary of my IRA.

PER STIRPES BENEFICIARY DESIGNATIONS The Custodian shall accept as complete and accurate all written instructions provided in good order by the estate/executor with regard to the identification of the beneficiaries and the allocations thereto.

The custodian will not accept beneficiary contingencies that are applied to either primary or contingent designations.

Primary, or _____
 Contingent Name _____ Social Security Number _____ Relationship to Participant _____

Address _____ Date of Birth _____ Percentage _____

City _____ State _____ ZIP Code _____

Apply a per-stirpes designation

Primary, or _____
 Contingent Name _____ Social Security Number _____ Relationship to Participant _____

Address _____ Date of Birth _____ Percentage _____

City _____ State _____ ZIP Code _____

Apply a per-stirpes designation

Continued on next page.

