

- E. The beneficiary (authorized representative) acknowledges that they know of no disputes or claims to the account which would affect the transfer/liquidation being requested.
- F. The beneficiary (authorized representative) indicates their instructions to transfer or liquidate the account by checking either (1), (2) or (3) in this section.
 - If (1) is selected, a new Master Account Number will be assigned (Master Account Application must accompany this form).
 - If (2) is selected, indicate the existing 13-digit Master Account Number to transfer into.
 - If (3) is selected, the TOD account will be liquidated to the Beneficiary's name listed in **Section 1**.

3. Taxpayer Certification and Signature of Beneficiary

TAXPAYER CERTIFICATION. Under penalties of perjury, I certify that (1) the number shown on this Application is my correct taxpayer identification number (or I am awaiting a number to be issued to me); and (2) I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service ("IRS") that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and (3) I am a U.S. citizen or other U.S. person (defined in the Form W-9 instructions); and (4) I am exempt from Foreign Account Tax Compliance Act reporting. You must cross out (2) above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest or dividends on your tax return. If you are claiming an exemption as a non-resident alien, you should check this box and attach an IRS Form W-8BEN to this form. **The IRS does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.**

(SG) denotes a signature guarantee is required.

Affix Medallion Signature Guarantee Here, If Required:
Stamps qualified for a specific date and/or individual or altered in any manner, may not be accepted.

(SG)

Signature of Beneficiary (or duly Authorized Rep of Beneficiary) _____ Date _____

- The beneficiary (authorized representative) certifies the Taxpayer Certification.
- An original signature of the beneficiary (or duly authorized representative of the beneficiary) must be provided.

Signature Guarantee

A Medallion Signature Guarantee is required and can be provided in this section.

- A Medallion Signature Guarantee cannot be qualified or altered in any manner (i.e. arrows, dates, etc).

I CERTIFY THAT ALL SIGNATURES THAT REQUIRE A SIGNATURE GUARANTEE ON THIS FORM ARE GENUINE.

Reg. Rep #	Office #	Registered Representative's Name (print)	Registered Representative's Signature	Date
Principal #	Principal's Name (print)	Principal's Signature		Date

In lieu of a Medallion Signature Guarantee, your Foresters Financial representative may provide a Signature Guarantee.

If further assistance is needed in completing this form please contact our Shareholder Services Department at 800-423-4026.