

Step 1: IRA OWNER INFORMATION

BENEFICIARY CHANGE FORM Strategic Funds

Please Print or Type

Forward To: First Trust Retirement, c/o SS&C

<u>Regular Mail</u> PO Box 219731 Kansas City, MO 64121-9731 855-387-3847 Overnight Delivery
Mail Stop: Strategic Funds
430 West 7th Street
Kansas City, MO 64105-1407

IRA Owner Name		Fund Nun	Fund Number			Account Number		
Phone Number		Social Sec	Social Security Number			h		
Address City / Stat		e / Zip		Email				
Step 2: DESIGNATION OF BENEFICIARIES The fellowing individual (a) as extinciped about the secondary is preferred to a secondary in the second								
The following individual(s) or entity(ies) shall be my primary and/or secondary beneficiary(ies). If neither primary nor secondary is indicated, the individual/entity will be deemed to be a primary beneficiary. If more than one primary beneficiary is designated and no distribution percentages are								
indicated, the beneficiaries will be deemed to own equal share percentages. Multiple secondary beneficiaries with no share percentage indicated will								
also be deemed to share equally. If any primary or secondary beneficiary dies before I do, his/her interest and the interest of his/her heirs shall								
terminate completely and the percentage share of any remaining beneficiary(ies) shall be increased on a pro rata basis. If no primary beneficiary(ies)								
survive me, the secondary beneficiary(ies) shall acquire the designated share. If you wish to have more than 6 beneficiary designations, please								
include a signed letter of instruction with additional beneficiary designations.								
	Beneficiary's Name		Date of		Relationship	Primary or	Share	
No.	If a Minor, Custodian's Full Name (non-IRA Relationship to the Minor Information	holder) and	Birth*	Social Security Number	(i.e., Spouse, Non-Spouse, Trust, Estate, etc.)	Secondary	%**	
	Relationship to the Millor Illionnation					☐ Primary		
1						,		
						<u>'</u>		
2						☐ Primary		
						☐ Secondary		
3						☐ Primary		
						☐ Secondary		
4						☐ Primary		
4						□ Secondary		
_						☐ Primary		
5						☐ Secondary		
						☐ Primary		
6						☐ Secondary		
*Date of birth is required for a Spousal beneficiary.								
**Primary and Secondary beneficiary designations must each total 100%.								
Step 3: SPOUSAL CONSENT								
Current Marital Status								
☐ I Am Not Married – I understand that if I become married in the future, I must complete a new IRA Designation of Beneficiary form.								
☐ I Am Married and my Spouse is my primary beneficiary								
☐ I Am Married and my Spouse is NOT my primary beneficiary — I understand that if I choose to designate a primary beneficiary other than my spouse, my								
spouse must sign below if I reside in a community property or marital property state (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Puerto								
Rico, Texas, Washington or Wisconsin).								
Consent of Spouse: I am the spouse of the above—named IRA Owner. I acknowledge that I have received a fair and reasonable disclosure of my spouse's property and financial obligations. Due to the important tax consequences of giving up my interest in this IRA, I have been advised to see a tax professional.								
I hereby give the IRA Owner any interest I have in the funds or property deposited in the IRA and consent to the beneficiary designation(s) indicated above. I assume								
full responsibility for any adverse consequences that may result. No tax or legal advice was given to me by the Custodian.								
Cignature of Chauca								
Signature of Spouse						Date		
Step 4: SIGNATURES REQUIRED								
IRA Owner Signature						Date		