



Regular mail: ESG Managers® Portfolios PO Box 9824 Providence, RI 02940-8024	Overnight mail: ESG Managers® Portfolios 101 Sabin Street Pawtucket, RI 02860-1427 Telephone: 888.374.8920
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Change of Beneficiary Form

Use this form to update the beneficiary information for your Traditional IRA, Roth IRA, Rollover IRA, SEP IRA, or SIMPLE IRA. For help with filling out this form please call Shareholder Services at 888.374.8920 between 8AM and 6PM ET M-F.

A. Please tell us about your existing account:

First Name	Middle Initial	Last Name		
Address	City	State	Zip Code	
Fund Name	Account Number	Social Security Number		
Signature				Date

Effective immediately, please remove all previously named beneficiaries on my ESG Managers® Portfolios retirement account and replace with the following information. I understand that all previously filed beneficiary changes will be disregarded, and only the beneficiaries named below will be entitled to my account in the event of my death. If more than one person is named and no percentage is indicated, a joint tenancy with the right of survivorship will be deemed to have been created. If the beneficiary is a trust, please indicate the date of the trust and the trustee(s) name:

B. Beneficiary Designation

Check here if you have attached and signed a separate sheet with additional Primary or Contingent Beneficiaries.

- Primary Beneficiary Contingent Beneficiary

First Name	Middle Initial	Last Name	Social Security/Tax ID No.	
Street Address	City	State	Zip Code	
Birthdate (mm/dd/yyyy)	Relationship	% of Distribution		

- Primary Beneficiary Contingent Beneficiary

First Name	Middle Initial	Last Name	Social Security/Tax ID No.	
Street Address	City	State	Zip Code	
Birthdate (mm/dd/yyyy)	Relationship	% of Distribution		

Note: the share percentage must equal 100% for all Primary or all Contingent Beneficiaries. If neither the Primary nor the Contingent Beneficiary box is checked, the beneficiary will be deemed to be a Primary Beneficiary. If a trust is designated as a Beneficiary, please provide both the date of the trust and the name(s) of the trustee(s). Per Stirpes 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 my beneficiaries and the allocations thereto.

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 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.

Consent of the Participant's Spouse may be required in a community property or marital property state to effectively designate a beneficiary other than, or in addition to, the Participant's Spouse. 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, ESG Managers® Portfolios 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 information, please consult your legal advisor.

I consent to the Beneficiary Designation.

Signature of Participant's Spouse (if applicable)	Date
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