ESG MANAGERS® PORTFOLIOS
Pax World Mutual Funds

Regular mail:
ESG Managers® Portfolios
PO Box 55389
Boston MA 02205-5389

Overnight mail:
ESG Managers® Portfolios
c/o BFDS
30 Dan Road, Suite #55389
Canton, MA 02021-2809
Telephone: 888.374.8920

# 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 888.374.8920 between 8AM and 6PM ET M-F.**

## A. Please tell us about your existing account:

Account Number

First Name | Middle Initial | Last Name | Social Security Number

Mailing Address | City | State | Zip Code

Signature | Date

☐ Check here if contact information above is new.

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.

Name of Beneficiary | % of Distribution | Social Security/Tax ID No. (required)

Relationship | Beneficiary's Birthdate (mm/dd/yyyy) | Name of Guardian/Trustee(s) (if Beneficiary is a Minor/Trust)

Beneficiary's Mailing Address | City | State | Zip Code

Name of Beneficiary | % of Distribution | Social Security/Tax ID No. (required)

Relationship | Beneficiary's Birthdate (mm/dd/yyyy) | Name of Guardian/Trustee(s) (if Beneficiary is a Minor/Trust)

Beneficiary's Mailing Address | City | State | Zip Code

## Contingent Beneficiary Designation

If none of the primary beneficiaries survive me, the account assets will pass to the contingent beneficiary (if any) named below. Please check here ☐ if you are attaching any page(s) with additional beneficiaries.); please sign the attached page.

Name of Beneficiary | % of Distribution | Social Security/Tax ID No. (required)

Relationship | Beneficiary's Birthdate (mm/dd/yyyy) | Name of Guardian/Trustee(s) (if Beneficiary is a Minor/Trust)

Beneficiary's Mailing Address | City | State | Zip Code

| Name of Beneficiary | % of Distribution | Social Security/Tax ID No. (required) |
|---|---|---|

| Relationship | Beneficiary's Birthdate (mm/dd/yyyy) | Name of Guardian/Trustee(s) (if Beneficiary is a Minor/Trust) |
|---|---|---|

| Beneficiary's Mailing Address | City | State | Zip Code |
|---|---|---|---|

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 Depositor'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 Depositor's Spouse. Disclaimer for Community and Marital Property States: The Depositor'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 Depositor's beneficiary designation or as to the ownership of the account after the death of the Depositor's Spouse. For additional information, please consult your legal advisor.

**I consent to the Beneficiary Designation.**

| Signature of Depositor's Spouse (if applicable) | Date |
|---|---|

| Witness | Date |
|---|---|