Please remember to sign form after printing.

Reset Print

Change of Beneficiary Designation Form IRA or 403(b)

Invesco

For use with Invesco National Trust Company (INTC) Custodial retirement plans.

Please complete this form if you have an INTC IRA or 403(b) account and would like to change the beneficiary designations for that account. We recommend you speak with a tax or financial advisor prior to designating or changing the designation of your beneficiary(ies).

PLEASE USE BLUE OR BLACK INK **PLEASE PRINT CLEARLY IN BLOCK CAPITAL LETTERS**

1 Account Registration

Start here > Use "Tab" key to move to next field.

Full Name of Owner

SSN

Existing Account Number or Plan ID

2 Beneficiaries

- I hereby designate the following primary beneficiary(ies) to receive any assets remaining in my account upon my death in equal amounts unless otherwise indicated below.
- In the event that no primary beneficiary(ies) listed below survives me, any assets remaining in my account shall be distributed to the contingent beneficiary(ies) in equal amount unless otherwise indicated below.
- If no primary beneficiary(ies) is designated or no designated beneficiary(ies) or contingent beneficiary(ies) survives me, any assets remaining in my account shall be distributed to my surviving spouse; however, if I am unmarried at the time of my death, any assets remaining in my account shall be distributed to my estate.
- This designation of beneficiary(ies) and any subsequent change in designation must be received by Invesco Investment Services, Inc. prior to my death in order to be effective.
- This designation revokes any prior designation.
- I retain the right to revoke this designation.

☐ Primary ☐ Contingent

Beneficiary's Full Name Percentage %

☐ SSN or ☐ TIN *(required)*

☐ Primary ☐ Contingent

Beneficiary's Full Name Percentage %

☐ SSN or ☐ TIN *(required)*

☐ Primary ☐ Contingent

Beneficiary's Full Name Percentage %

☐ SSN or ☐ TIN *(required)*

Beneficiaries *(continued)*

☐ Primary ☐ Contingent

Beneficiary's Full Name Percentage ___ %

☐ SSN or ☐ TIN *(required)*

___ – ___ – ___

(If you have additional beneficiaries, please attach a separate page including all of the information requested in section 2.)

3 Signature

Signature of Account Owner

Date (mm/dd/yyyy) __ / __ / ____

Submit form to:

After completing the form, please sign it and send it to one of the addresses detailed below.

(Direct Mail)
Invesco Investment Services, Inc.
P.O. Box 4739
Houston, TX 77210-4739

(Overnight Mail)
Invesco Investment Services, Inc.
11 Greenway Plaza, Ste. 2500
Houston, TX 77046

For additional assistance please contact an Invesco Client Services Representative at 800 959 4246, weekdays, 7 a.m. to 6 p.m. Central Time.

Visit our website at invesco.com

The Invesco website gives you 24-hour access to your mutual fund account. By using the website, you can obtain the most up-to-date information about your account.

- Check daily and quarterly account balance
- Confirm your account transaction history
- View account statements and tax forms
- Sign up for eDelivery of quarterly statements, daily transaction statements, prospectuses, reports and tax forms
- Check the current fund price, yield and total return on any fund
- Process transactions
- Retrieve account forms and investor education materials

Invesco 24-Hour Automated Investor Line 800 246 5463

The Invesco Investor Line gives you 24-hour toll-free access to your mutual fund account. By calling the Invesco Investor Line any day of the week, 24 hours a day, you can obtain the most up-to-date information about your account.

Simply dial 800 246 5463. To use the system, please have your account numbers and Social Security number handy.

- Obtain fund prices
- Confirm your last three transactions
- Order a recent account statement(s)
- Verify your account balance
- Process transactions
- And more

On or about April 30, 2010, Invesco Aim Distributors, Inc. becomes Invesco Distributors, Inc., Invesco Aim Investment Services, Inc. becomes Invesco Investment Services, Inc., and AIM funds become Invesco funds. In addition, invescoaim.com becomes invesco.com.

On or about April 30, 2010, Invesco replaces AIM in the fund name.