Please remember to sign application after printing.

Print | Clear Form

Change of Beneficiary Designation (TOD)

For use only with transfer on death registration. For retirement accounts, use the change of beneficiary designation form IRA or 403(b)

- Please complete this form if you have a transfer on death account with Invesco and would like to change the beneficiary designations for that account.

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

1 Registration Information and Invesco Account Number

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

Social Security Number *(Exactly as it appears on account.)*

___ — __ — ____

Existing Invesco Account Number

Account Registration *(Please print name(s) as it appears on account.)*

Daytime Phone Number

___ — ___ — ____

Evening Phone Number

___ — ___ — ____

2 Beneficiary Designation

I hereby designate the following beneficiary(ies) to receive the assets remaining in my transfer on death account upon my death. If no beneficiary is designated or no designated beneficiary or contingent beneficiary survives me, the balance in my account will be distributed to the legal representative of my estate. I retain the right to revoke this designation.

Please use a separate page if additional transfer on death beneficiaries are to be designated. Primary and contingent beneficiary totals must each equal 100%.

☐ Primary ☐ Contingent Percentage ___ %

TOD Beneficiary's Full Name

Relationship

Beneficiary's Social Security Number

___ — __ — ____

☐ Primary ☐ Contingent Percentage ___ %

TOD Beneficiary's Full Name

Relationship

Beneficiary's Social Security Number

___ — __ — ____

☐ Primary ☐ Contingent Percentage ___ %

TOD Beneficiary's Full Name

Relationship

Beneficiary's Social Security Number

___ — __ — ____

If you have additional beneficiaries please attach a list.

3 Signature

Signature of Account Owner

Date (mm/dd/yyyy)

Signature of Joint 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 219078
Kansas City, MO 64121-9078

(Overnight Mail)
Invesco Investment Services, Inc.
c/o DST Systems, Inc.
430 W. 7th Street
Kansas City, MO 64105-1407

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