Transfer on Death Registration Form

Praxis Mutual Funds

A fund family of Everence

If you have any questions regarding this application, please call Shareholder Services at (800) 977-2947.

Please send this form to:

Regular mail
Praxis Mutual Funds
c/o U.S. Bancorp Fund Services LLC
P.O. Box 701
Milwaukee, WI 53201-0701

Overnight mail
Praxis Mutual Funds
c/o U.S. Bancorp Fund Services LLC
615 E. Michigan St., 3rd Floor
Milwaukee, WI 53202-5207

Registering your account under the transfer on death regulations will have important tax and/or legal ramifications. Please consult with your own tax or legal adviser before completing it.

Account information

Name of account owner ____________________

Name of joint account owner ____________________

Please check one:

☐ Existing account(s). Please fill in the account number(s) below:

Account number ____________________

Account number ____________________

☐ New account. If this is for a new account, please list the fund name below and submit this form with a new application.

Fund name ____________________

Beneficiary designation

I revoke any prior beneficiary designation. Reserving the right to revoke or change this beneficiary designation, I elect, upon my death, that all fund accounts will be distributed in equal shares (unless otherwise provided) to each beneficiary designated below. In the event a beneficiary does not survive me, such beneficiary's share will be distributed pro rata to the surviving beneficiary(ies), unless I specified otherwise. If any beneficiary survives me but fails to survive distribution of his or her entire share, then the remaining portion of such beneficiary's share will be distributed to such beneficiary's estate.

Beneficiary's name	Birth date	Relationship	Social Security Number	Percentage
				%
				%

Secondary beneficiary's name	Birth date	Relationship	Social Security Number	Percentage
				%
				%

Spousal consent

By signing below, I/we hereby: 1) request my mutual fund company to register the fund account named in this transfer of death designation form with the beneficiary or beneficiaries named above; 2) agree that this transfer of death account will be governed by the rules governing transfer of death registration listed on this form, which are incorporated herein by reference as if set forth in full; 3) revoke any prior designations; and 4) retain the right to revoke this designation and designate a new beneficiary at any time by communicating with U.S. Bancorp Fund Services LLC, in writing.

Spouse's name (please print) ____________________ Date

Spouse's signature ____________________

Authorization

By establishing this account, I hold harmless and indemnify Praxis and any of their affiliates or mutual funds managed by such affiliates, and each of their respective directors, trustees, officers, employees, and representatives from any losses, expenses, costs, or liability (including attorney's fees) resulting from Praxis acting on this Transfer on Death Registration Request, maintaining this account or distributing assets from this account in accordance with this request.

Signature of owner	Date	Signature of joint owner	Date

Transfer on death guidelines

What is a transfer on death (TOD) agreement?
A transfer on death agreement is a registration used to signal that an account is to be transferred at the owner's, or last surviving joint owner's, death to the named beneficiary(ies). The ownership transfers to the beneficiary(ies) without the necessity of probate. However, assets from this fund will still be included in your estate. Remember, this registration will supersede your will.

Who can register an account under TOD?
Accounts which are registered under the name of a single individual, Joint Tenants with Rights of Survivorship, or Tenants by Entireties may use this registration. The owner(s) of this account **must** reside in a state which recognizes TOD. Not all states do.

Who is an eligible beneficiary?
The beneficiary can be an individual, a trust, corporation or other entity. Multiple beneficiaries are permitted. During the life of the owner(s), the beneficiary(ies) has no interest in or rights with respect to the account.

Can I add, change, or remove a beneficiary?
The owner(s) can add, change or remove a beneficiary at any time. To add or change a beneficiary, simply submit the form on the reverse signed by all owners with signatures guaranteed. To remove a beneficiary, send a letter of instruction signed by all owners with signatures guaranteed.

How will this affect my ability to make telephone exchanges?
You may exchange money by phone only between accounts with identical registrations. If you have one account covered by the TOD registration, and another not covered by the TOD, you can't exchange money between the accounts. Exchanges between unlike registrations must be made in writing, and all owners must sign the request and have their signatures accompanied by a medallion signature guarantee.

What must the beneficiary do at the owner(s)' death?
Following the death of all owners, the beneficiary must provide a certified copy of the death certificate for the owner(s), medallion signature guaranteed instructions from the beneficiary as to what to do with the account, and a completed W-9 form. If the beneficiary wants to transfer the proceeds to another Praxis account, then a completed application should also be submitted.