

IRA Beneficiary Addition/Change Form

For Traditional, ROTH, SEP, and SIMPLE IRAs

Mail to:

Osterweis Funds
c/o U.S. Bank Global Fund Services
P.O. Box 701
Milwaukee, WI 53201-0701

Overnight Express Mail to:

Osterweis Funds
c/o U.S. Bank Global Fund Services
615 E. Michigan St., FL3
Milwaukee, WI 53202-5207
(866) 236-0050

IMPORTANT NOTICE: This designation will not be in force unless it is signed and received by the custodian at one of the addresses above before the death of the IRA Grantor (shareholder). The terms, provisions, and limitations of the IRA Plan and Custodial Agreement, as amended from time to time, are controlling at all times and govern the rights of the Grantor and any beneficiaries. The Custodial Agreement is available upon request by calling (866) 236-0050.

Unless otherwise noted, payments upon death will be made to the primary beneficiary(ies) first. The secondary beneficiary(ies) inherit only if all primary beneficiaries are deceased or disclaim their inheritance.

1. Investor Information

First Name M.I. Last Name Account Number

Social Security Number Email Address

Check this box if this change is for all registered accounts under your Social Security Number.

2. Beneficiary Information

If you need more space, please enclose a separate piece of paper.

I hereby revoke all prior beneficiary designations and designate the following as my beneficiary(ies).

Primary Beneficiary(ies)

Name Date of Birth

Street Address City/State/Zip

Social Security Number Percent Relationship

Email Address Phone Number

Name Date of Birth

Street Address City/State/Zip

Social Security Number Percent Relationship

Email Address Phone Number

Name Date of Birth

Street Address City/State/Zip

Social Security Number Percent Relationship

Email Address Phone Number

Secondary Beneficiary(ies)

_____ Name	_____ Date of Birth	
_____ Street Address	_____ City/State/Zip	
_____ Social Security Number	_____ Percent	_____ Relationship
_____ Email Address	_____ Phone Number	
_____ Name	_____ Date of Birth	
_____ Street Address	_____ City/State/Zip	
_____ Social Security Number	_____ Percent	_____ Relationship
_____ Email Address	_____ Phone Number	
_____ Name	_____ Date of Birth	
_____ Street Address	_____ City/State/Zip	
_____ Social Security Number	_____ Percent	_____ Relationship
_____ Email Address	_____ Phone Number	

Spousal Consent: If you name someone other than or in addition to your spouse as primary beneficiary and reside in a community or marital property state, including AZ, CA, ID, LA, NV, NM, TX, WA, and WI, your spouse must consent by signing below.

X

Signature of Spouse

Date

3. Signature

I have read and understand the Disclosure Statement and Custodial Account Agreement. I adopt the Osterweis Funds' Custodial Account Agreement, as it may be revised from time to time, and appoint the Custodian or its agent to perform those functions and appropriate administrative services specified. If the Grantor is a minor under the laws of the Grantor's state of residence, a parent or guardian must sign this form (i.e. "Sally Doe, parent of Jane Doe"). Until the Grantor reaches the age of majority, the parent or guardian will exercise the duties of the Grantor. (If not a parent, the guardian must provide a copy of the letters of appointment.)

X

Signature of Owner (or Guardian if IRA Owner Is a Minor)

Date (MM/DD/YYYY)