

IRA CHANGE OF BENEFICIARY FORM

Please complete this form to change the beneficiary designation for your Westcore IRA.

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ACCOUNT INFORMATION

Please provide us with your current Westcore IRA information.

Westcore Account Number			
Owner's Name (First, Middle Initial, Last)		Social Security Number	Date of Birth
Account Mailing Address	City	State	Zip Code
Email Address (optional)		Telephone Number	

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PRIMARY BENEFICIARY

I hereby make the following designation of beneficiary in accordance with the provisions in the Custodial Agreement for Regular IRAs and Roth IRAs (as applicable).

Please attach a letter of instruction if you would like to name more than two primary or contingent beneficiaries.

Primary Beneficiary(ies): *(If the sum of all primary beneficiary distribution percentages does not total 100%, Westcore Funds will assume equal distribution.)*

Name (First, Middle Initial, Last)		Relationship	
Social Security Number	Date of Birth	% of Account	
Name (First, Middle Initial, Last)		Relationship	
Social Security Number	Date of Birth	% of Account	

Contingent Beneficiary(ies): *(If the sum of all contingent beneficiary distribution percentages does not total 100%, Westcore Funds will assume equal distribution.)*

Name (First, Middle Initial, Last)		Relationship	
Social Security Number	Date of Birth	% of Account	
Name (First, Middle Initial, Last)		Relationship	
Social Security Number	Date of Birth	% of Account	

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TRUST INFORMATION

Please use the following designation if you would like any portion of the benefits due in the event of your death paid to a trust.

Name of Trust	Tax Identification Number of Trust	% of Account	
Trustee's Name (First, Middle Initial, Last)	Trustee's Social Security Number or Tax Identification Number	Trustee's Date of Birth	
Trustee's Address	City	State	Zip

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SIGNATURE

I hereby revoke any previous beneficiary designation made by me under the Westcore Funds IRA account(s) listed above. I reserve the right to revoke or amend this beneficiary designation at any time by written notice to Westcore Funds, P.O. Box 44323, Denver, CO 80201-4323. I understand that the change is effective when received in writing by the Custodian.

Signature	Date
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Mail to: Westcore Funds
 P.O. Box 44323
 Denver, Colorado 80201-4323