



Questions? Go to woolardent.com.

Beneficiaries—Investment

Use this form to add or change the beneficiaries of your Woolard Enterprises investment account(s). Type on screen or print out and fill in using CAPITAL letters and black ink. If you need more room for information, make a copy of the relevant page.

Helpful to Know

- You may want to review this document with a tax, financial, or legal advisor.
- This form cancels any existing beneficiary information. Be sure this form includes ALL beneficiaries you want on the account(s).
- You can change beneficiaries any time *by sending us a new form*.
- To add or change beneficiaries on other types of accounts, go to *woolardent.com*.

1. Account Owner

This phone number may be used if we have questions, but will not be used to update your account information.

Name	
Daytime Phone	Extension

2. Investor Account Number

List your account number here. This number can be found on any receipt from us.

Investor Account Number	LEAVE BLANK	LEAVE BLANK
LEAVE BLANK	LEAVE BLANK	LEAVE BLANK

3. Beneficiaries

Primary Beneficiaries

For each beneficiary you list, check a beneficiary type and provide all information, including the full first and last name as evidenced by a government-issued, unexpired document (e.g., driver's license, passport, permanent resident card).

If you outlive a beneficiary and you want that beneficiary's share to go to his or her descendants, check "Per stirpes."

<input type="checkbox"/> Spouse	Name <i>If naming spouse as a beneficiary, do so here.</i>		
<input type="checkbox"/> Non-Spouse			
<input type="checkbox"/> Trust	Social Security or Taxpayer ID Number	Date of Birth/Trust <i>MM DD YYYY</i>	Share Percentage <input type="checkbox"/> Per stirpes
<input type="checkbox"/> Other Entity			%
	Name		
<input type="checkbox"/> Non-Spouse			
<input type="checkbox"/> Trust	Social Security or Taxpayer ID Number	Date of Birth/Trust <i>MM DD YYYY</i>	Share Percentage <input type="checkbox"/> Per stirpes
<input type="checkbox"/> Other Entity			%
	Name		
<input type="checkbox"/> Non-Spouse			
<input type="checkbox"/> Trust	Social Security or Taxpayer ID Number	Date of Birth/Trust <i>MM DD YYYY</i>	Share Percentage <input type="checkbox"/> Per stirpes
<input type="checkbox"/> Other Entity			%
	Name		
<input type="checkbox"/> Non-Spouse			
<input type="checkbox"/> Trust	Social Security or Taxpayer ID Number	Date of Birth/Trust <i>MM DD YYYY</i>	Share Percentage <input type="checkbox"/> Per stirpes
<input type="checkbox"/> Other Entity			%

Total must add up to 100%. %

Beneficiaries continues on next page. >>



3. Beneficiaries, continued

Contingent Beneficiaries

Contingent beneficiaries receive assets only if no primary beneficiary survives you. Do NOT list any primary beneficiaries here.

If you outlive a beneficiary and you want that beneficiary's share to go to his or her descendants, check "Per stirpes."

<input type="checkbox"/> Spouse	Name <i>If naming spouse as a beneficiary, do so here.</i>			
<input type="checkbox"/> Non-Spouse				
<input type="checkbox"/> Trust	Social Security or Taxpayer ID Number	Date of Birth/Trust MM DD YYYY	Share Percentage	<input type="checkbox"/> Per stirpes
<input type="checkbox"/> Other Entity			%	
	Name			
<input type="checkbox"/> Non-Spouse				
<input type="checkbox"/> Trust	Social Security or Taxpayer ID Number	Date of Birth/Trust MM DD YYYY	Share Percentage	<input type="checkbox"/> Per stirpes
<input type="checkbox"/> Other Entity			%	
	Name			
<input type="checkbox"/> Non-Spouse				
<input type="checkbox"/> Trust	Social Security or Taxpayer ID Number	Date of Birth/Trust MM DD YYYY	Share Percentage	<input type="checkbox"/> Per stirpes
<input type="checkbox"/> Other Entity			%	
	Name			
<input type="checkbox"/> Non-Spouse				
<input type="checkbox"/> Trust	Social Security or Taxpayer ID Number	Date of Birth/Trust MM DD YYYY	Share Percentage	<input type="checkbox"/> Per stirpes
<input type="checkbox"/> Other Entity			%	
				%

Total must add up to 100%.

4. Signature and Date *Account owner must sign and date.*

By signing below, you:

- Affirm that the beneficiary information provided on this form replaces any prior beneficiary information that may be on record for the indicated account(s).
- Acknowledge that, if you check "per stirpes," that any share otherwise payable to a beneficiary shall instead be paid to that beneficiary's surviving descendants by right of representation if the original beneficiary does not survive the account owner.
- Acknowledge that "per stirpes" creates a category of beneficiaries (for example, the children of a beneficiary), and therefore may end up including individuals not yet born or adopted.
- Acknowledge that listing beneficiaries by name does NOT create a category of beneficiaries, and that if you later want to include other beneficiaries, you will need to submit a new beneficiary form.
- Agree that Woolard Enterprises has no obligation to locate or notify any beneficiary or to independently verify any information submitted by any person claiming an interest in your account.
- Acknowledge that if you do not provide percentages, the account will be divided equally among primary or contingent beneficiaries, as applicable.
- Acknowledge that if you do not properly name a beneficiary, or no beneficiary survives you, your beneficiary will be your spouse or, if you are not married, your estate.
- Agree that if your beneficiary allocation totals at least 99%, but less than 100% (e.g., 3 named beneficiaries are each assigned a 33% interest in the account), Woolard Enterprises will assign the unallocated remainder to the first named beneficiary.
- Acknowledge that when your assets are distributed to your beneficiaries, fractional shares that cannot be distributed in accordance with your instructions will instead be given to the beneficiary receiving the largest percentage of the account's assets or, if each beneficiary is receiving an equal percentage, to the last paid beneficiary.
- Acknowledge that Woolard Enterprises has no responsibility for the application of assets distributed to beneficiaries.
- Acknowledge that if you do not properly name a beneficiary, or no beneficiary survives you, the account will go to other members of Woolard Enterprises equally.

PRINT INVESTOR NAME	
INVESTOR SIGNATURE	DATE MM/DD/YYYY
SIGN X	X

Did you sign the form? Send the ENTIRE form to Woolard Enterprises.
 Questions? Go to woolardent.com/.
Regular mail
 Woolard Enterprises
 362 Westphalian Dr
 Celina Tx 75009

