



Transfer On Death Designation Form

In Complete this form to establish a Transfer on Death (TOD) beneficiary(ies) on your account.

- Only accounts registered to individuals, joint tenants or tenants by the entireties may designate a TOD beneficiary(ies).
- A TOD direction transfers ownership of your shares to your
- Acceptance and execution of TOD directions is a matter of contract between you and Wasatch Funds and is subject to the Rules for Registration of Shares in Beneficiary Form (Rules) adopted by Wasatch Funds, which Rules are incorporated by reference in the Agreement.
- This Agreement shall be governed by those Rules and construed in accordance with the laws of the state of Minnesota.

Overnight Delivery:
 Wasatch Funds
 235 W. Galena Street
 Milwaukee, WI 53212

Regular Mail:
 Wasatch Funds
 P.O. Box 2172
 Milwaukee, WI 53201-2172

1. INVESTOR INFORMATION

Name		Social Security Number	Birthdate
Permanent Address (no P.O. boxes)		City	State Zip
Phone Number	Email Address		

This TOD election is for (select only one):

- A new account (A New Account Application must be submitted with this form)
- An existing account(s). Please indicate the fund(s) and account number(s) below:

Fund	Account Number
Fund (Optional)	Account Number
Fund (Optional)	Account Number

2. PRIMARY BENEFICIARY(IES) Individual(s) or entity(ies) who will receive the funds upon the death of all owners.

Name		Social Security Number	Birthdate
Permanent Address (no P.O. boxes)		City	State Zip
% Of Account	Relationship	Phone Number	

Name		Social Security Number	Birthdate
Permanent Address (no P.O. boxes)		City	State Zip
% Of Account	Relationship	Phone Number	

Please note: Unless otherwise indicated, Wasatch will assume equal beneficiary distribution if more than one primary beneficiary is designated. The sum of the percentages for all primary beneficiaries must equal 100%. If you wish to name more than two primary beneficiaries, please attach a separate sheet with all of the requested information for each beneficiary.

3. CONTINGENT BENEFICIARY(IES) Individual(s) or entity(ies) who will receive the funds upon the death of all owners.

Name		Social Security Number	Birthdate
Permanent Address (no P.O. boxes)		City	State Zip
% Of Account	Relationship	Phone Number	

Name	Social Security Number	Birthdate
Permanent Address (no P.O. boxes)	City	State
		Zip
% Of Account	Relationship	Phone Number

Please note: Unless otherwise indicated, Wasatch will assume equal beneficiary distribution if more than one primary beneficiary is designated. The sum of the percentages for all primary beneficiaries must equal 100%. If you wish to name more than two primary beneficiaries, please attach a separate sheet with all of the requested information for each beneficiary.

4. VERIFICATION & SIGNATURES (REQUIRED)

A Medallion signature guarantee* is required for all account holders unless this form is submitted with a new account application.

- Before signing, carefully read and comply with the requirements printed below.
- Sign exactly as Name(s) appears on your account registration. All account holders must sign.

I/We hereby instruct Wasatch Funds and its transfer agent, UMB Fund Services, Inc., to register the shares held in the above referenced account (or account to be established by the accompanying application), in beneficiary form, assigning ownership on my/our death to my/our beneficiary(ies). I/We direct Wasatch Funds to transfer these shares and any shares into which these shares have been exchanged, in accordance with this direction and these Rules of Wasatch Funds respecting TOD directions and Securities Transfer Association (STA) TOD Rules as they may be amended, modified or supplemented from time to time. Wasatch Funds reserves the right, at any time without prior notice, to suspend, limit, modify or terminate TOD registrations.

Wasatch Funds accepts this Agreement to register shares in beneficiary form in Milwaukee, WI.

Signature	Date
Signature	Date
Signature	Date

Medallion Signature Guarantee

If more space is required, attach a separate page with signatures of account holders and Medallion signature guarantees.

*Medallion signature guarantees must be obtained from a participant in a Medallion program endorsed by the Securities Transfer Association. Participants are typically commercial banks or trust companies in the United States, brokerage firms that are members of the National Association of Securities Dealers, Inc. or members of the New York Stock Exchange. *A Medallion signature guarantee may not be provided by a notary public.*