



Beneficiary Designation

AMERICAN FUNDS®

From Capital Group

403(b) Plan

Ozark Action, Inc. 403(b) Plan

344550-01

For My Information

- For questions regarding this form, visit the website at www.myretirement.americanfunds.com or contact Service Center at 1-800-204-3731.
- Use black or blue ink when completing this form.

A Participant Information

Account extension, if applicable, identifies funds transferred to a beneficiary due to participant's death, alternate payee due to divorce or a participant with multiple accounts.

Account Extension

			-			-					
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Social Security Number (Must provide all 9 digits)

Last Name

First Name

M.I.

Date of Birth

()

Email Address

Daytime Phone Number

()

Married

Unmarried

Alternate Phone Number

B Beneficiary Designation (Attach an additional sheet to name additional beneficiaries.)

Primary Beneficiary Designation (Primary beneficiary designations must total 100% - percentage can be made out to two decimal places.)

- If I am married, my Plan requires my spouse to be named as primary beneficiary for 100% of my account balance, or my spouse must consent to my beneficiary designation.
- See the attached examples on how to complete the below beneficiary designations if the beneficiary is a non-individual, such as a trust, charity or estate.

%					/	/
% of Account Balance	Primary Beneficiary Name (Name of Individual, Trust, Charity, etc.)	Relationship	Social Security or Taxpayer Identification Number	Date of Birth or Trust Date		
()						
Phone Number (Optional)						

%					/	/
% of Account Balance	Primary Beneficiary Name (Name of Individual, Trust, Charity, etc.)	Relationship	Social Security or Taxpayer Identification Number	Date of Birth or Trust Date		
()						
Phone Number (Optional)						

%					/	/
% of Account Balance	Primary Beneficiary Name (Name of Individual, Trust, Charity, etc.)	Relationship	Social Security or Taxpayer Identification Number	Date of Birth or Trust Date		
()						
Phone Number (Optional)						

Contingent Beneficiary Designation (Contingent beneficiary designations must total 100% - percentage can be made out to two decimal places.)

%				/ /
% of Account Balance	Contingent Beneficiary Name <i>(Name of Individual, Trust, Charity, etc.)</i>	Relationship	Social Security or Taxpayer Identification Number	Date of Birth or Trust Date
()				
Phone Number <i>(Optional)</i>				
%				/ /
% of Account Balance	Contingent Beneficiary Name <i>(Name of Individual, Trust, Charity, etc.)</i>	Relationship	Social Security or Taxpayer Identification Number	Date of Birth or Trust Date
()				
Phone Number <i>(Optional)</i>				
%				/ /
% of Account Balance	Contingent Beneficiary Name <i>(Name of Individual, Trust, Charity, etc.)</i>	Relationship	Social Security or Taxpayer Identification Number	Date of Birth or Trust Date
()				
Phone Number <i>(Optional)</i>				

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 Last Name First Name M.I. Social Security Number Number

C Signatures and Consent *(Signatures must be on the lines provided.)*

Participant Consent for Beneficiary Designation *(Please sign on the 'Participant Signature' line below.)*

I have completed, understand and agree to all pages of this Beneficiary Designation form. Subject to and in accordance with the terms of the Plan, I am making the above beneficiary designations for my vested account in the event of my death. If I have more than one primary beneficiary, the account will be divided as specified. If a primary beneficiary predeceases me, his or her benefit will be allocated to the surviving primary beneficiaries. Contingent beneficiaries will receive a benefit only if there is no surviving primary beneficiary, as specified. If a contingent beneficiary predeceases me, his or her benefit will be allocated to the surviving contingent beneficiaries. If I fail to designate beneficiaries, amounts will be paid pursuant to the terms of the Plan or applicable law. This designation is effective upon execution and delivery to Plan Administrator. If any information is missing, additional information may be required prior to recording my designation.

This designation supersedes all prior designations. Beneficiaries will share equally if percentages are not provided and any amounts unpaid upon death will be divided equally. **Primary and contingent beneficiaries must separately total 100%. The percentages can be divided up to two decimal points (Example: 33.33%).**

Important Notice: In accordance with ERISA and/or Plan Document, if I am married and I elect a primary beneficiary other than my spouse or in addition to my spouse, my spouse must consent by signing the Spousal Consent for Beneficiary Designation section of this form.

Any person who presents a false or fraudulent claim is subject to criminal and civil penalties.

Participant Signature _____ **Date (Required)** _____
A handwritten signature is required on this form. An electronic signature will not be accepted and will result in a significant delay.

Spousal Consent for Beneficiary Designation *(If applicable, please have the Spouse sign on the 'Spouse's Signature' line below.)*

I, *(name of spouse)* _____, the current spouse of the participant, hereby voluntarily consent to the participant's primary beneficiary designation above and understand its effect. I understand that my spouse's beneficiary designation means that I will not receive 100% of his or her vested account balance under the Plan and that my spouse's election is not valid unless I consent to it. I understand that my consent is irrevocable unless my spouse changes the beneficiary designation, or designates me to receive 100% of his or her vested account balance.

Spouse's Signature _____ **Date (Required)** _____

For Residents of all states (except California), please have your notary complete the section below.

Notice to California Notaries using the California Affidavit and Jurat Form the following items must be completed by the notary on the state notary form: the title of the form, the plan name, the plan number, the document date, my name and my spouse's name. The notary forms not containing this information will be rejected and it will delay this request.

My signature must be notarized by a Notary Public or witnessed by my spouse's Plan Administrator. The date I sign this form in the 'My Consent' section must match the date on which my signature is notarized or witnessed in this section.

Statement of Notary

NOTE: Notary seal must be visible.

The consent to this request was subscribed and sworn *(or affirmed)*

State of _____ to before me on this _____ day of _____, year _____, by

SEAL

)ss. ***(name of spouse)***

proved to me on the basis of satisfactory evidence to be the person

County of _____ who appeared before me, who affirmed that such consent represents his/her free and voluntary act.

Notary Public _____ My commission expires ____ / ____ /

Authorized Plan Administrator Signature *(Please sign on the 'Authorized Plan Administrator Signature' line below.)*

I accept the information provided by the participant on this form.

If Spousal Consent notarization is not obtained, I certify that the consent was signed by the spouse of the participant in my presence. The date that I sign this form must match the date the participant's spouse has signed.

Authorized

Plan

Administrator Signature Date

(Required)

Print Full Name

344550-01

Last Name First Name M.I. Social Security Number Number

D Mailing Instructions

Employer DO NOT send this form to Service Center. Please retain for your records.

EXAMPLE BENEFICIARY DESIGNATIONS

Example 1: Multiple Individuals as Beneficiaries

B Beneficiary Designation <i>(Attach an additional sheet to name additional beneficiaries.)</i>				
Primary Beneficiary Designation <i>(Primary beneficiary designations must total 100% - percentage can be made out to two decimal places.)</i>				
<ul style="list-style-type: none"> If I am married, my Plan requires my spouse to be named as primary beneficiary for 100% of my account balance, or my spouse must consent to my beneficiary designation. See the attached examples on how to complete the below beneficiary designations if the beneficiary is a non-individual, such as a trust, charity or estate. 				
<u>33.33</u> % <u>John M. Doe</u> <u>Brother</u> <u>XXX-XX-XXXX</u> <u>01/06/1954</u>				
% of Account Balance	Primary Beneficiary	Relationship	Social Security or Taxpayer Identification Number	Date of Birth
<i>(Name of Individual, Trust, Charity, etc.)</i>				
Phone Number <i>(Optional)</i>				
<u>33.33</u> % <u>Don M. Doe</u> <u>Brother</u> <u>XXX-XX-XXXX</u> <u>01/06/1954</u>				
% of Account Balance	Primary Beneficiary	Relationship	Social Security or Taxpayer Identification Number	Date of Birth
<i>(Name of Individual, Trust, Charity, etc.)</i>				
Phone Number <i>(Optional)</i>				
<u>33.34</u> % <u>Michelle L. Doe</u> <u>Sister</u> <u>XXX-XX-XXXX</u> <u>01/06/1957</u>				
% of Account Balance	Primary Beneficiary	Relationship	Social Security or Taxpayer Identification Number	Date of Birth
<i>(Name of Individual, Trust, Charity, etc.)</i>				
Phone Number <i>(Optional)</i>				

B Beneficiary Designation <i>(Attach an additional sheet to name additional beneficiaries.)</i>				
Primary Beneficiary Designation <i>(Primary beneficiary designations must total 100% - percentage can be made out to two decimal places.)</i>				

- If I am married, my Plan requires my spouse to be named as primary beneficiary for 100% of my account balance, or my spouse must consent to my beneficiary designation.
- See the attached examples on how to complete the below beneficiary designations if the beneficiary is a non-individual, such as a trust, charity or estate.

100	%	ABC Charity	Charity	XX-XXXXXXX	/	/
% of Account Balance	Primary Beneficiary	Relationship	Social Security or Taxpayer	Date of Birth		
<i>(Name of Individual, Trust, Charity, etc.) Identification Number or Trust Date (XXX) XXX-XXXX</i>						

Phone Number (Optional)						

Example 2: Trust as Beneficiary

B Beneficiary Designation *(Attach an additional sheet to name additional beneficiaries.)*

Primary Beneficiary Designation *(Primary beneficiary designations must total 100% - percentage can be made out to two decimal places.)*

- If I am married, my Plan requires my spouse to be named as primary beneficiary for 100% of my account balance, or my spouse must consent to my beneficiary designation.
- See the attached examples on how to complete the below beneficiary designations if the beneficiary is a non-individual, such as a trust, charity or estate.

100	%	Trust of Jane Doe	Trust	XX-XXXXXXX	06/30/2015
% of Account Balance	Primary Beneficiary	Relationship	Social Security or Taxpayer	Date of Birth	
<i>(Name of Individual, Trust, Charity, etc.) Identification Number or Trust Date (XXX) XXX-XXXX</i>					

Phone Number (Optional)					

Example 3: Estate as Beneficiary

B Beneficiary Designation *(Attach an additional sheet to name additional beneficiaries.)*

Primary Beneficiary Designation *(Primary beneficiary designations must total 100% - percentage can be made out to two decimal places.)*

- If I am married, my Plan requires my spouse to be named as primary beneficiary for 100% of my account balance, or my spouse must consent to my beneficiary designation.
- See the attached examples on how to complete the below beneficiary designations if the beneficiary is a non-individual, such as a trust, charity or estate.

100	%	Estate of Anne Doe	Estate		/	/
% of Account Balance	Primary Beneficiary	Relationship	Social Security or Taxpayer	Date of Birth		
<i>(Name of Individual, Trust, Charity, etc.) Identification Number or Trust Date (XXX) XXX-XXXX</i>						

Phone Number (Optional)						

Example 4: Charity as Beneficiary