



Instructions: This form is to be used to change the beneficiary designation for your Westcore IRA. Please mail the completed form to WESTCORE FUNDS, P.O. Box 44323, Denver, CO 80201-4323

1 Account Information

IRA Account Number(s)
First Name Middle Initial Last Name
Account Mailing Address
City State Zip Code
Social Security Number Date of Birth
Daytime Phone Evening Phone E-mail Address (if any)

2 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).

If you name multiple primary or contingent beneficiaries, please list them on a separate sheet. Please include all information requested below for each additional beneficiary, as well as your name, address and phone number.

1. Name Percentage
Relationship Date of Birth Social Security No.1.
2. Name Percentage
Relationship Date of Birth Social Security No.
3. Name Percentage
Relationship Date of Birth Social Security No.
4. Name Percentage
Relationship Date of Birth Social Security No.

If distribution percentages are not specified or do not total 100%, Westcore Funds will assume equal beneficiary distribution.

3 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 Percentage
Name of Trustee Date of Birth
Address City/State/Zip

4 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

Mail to:
Westcore Funds
P.O. Box 44323
Denver, CO 80201-4323

Thank you for your investment in Westcore Funds!