



Church Extension Fund

The South Dakota District of The Lutheran Church-Missouri Synod
PO Box 89110
Sioux Falls, SD 57109-9110
605-361-1514 / 1-888-385-7330

**Beneficiary
Bequest Form**

(This form is only available for individual and joint accounts; **not** for custodial accounts. Instructions on next page. If you are naming a beneficiary for an existing certificate, you must return the original certificate.)

Please Print

Owner(s) name(s): _____

List the person(s) or organizations(s) such as the ministry of CEF (national or district), or a congregation and related information to whom you want to transfer your certificate(s) at your death (or, if more than one owner, at the death of the last surviving owner). If you name an LCMS-related ministry, simply provide the name, city, state and percentage amount.

Name _____ Date of Birth _____ Percentage _____ %
Address _____ Social Security Number _____
Relationship _____

Name _____ Date of Birth _____ Percentage _____ %
Address _____ Social Security Number _____
Relationship _____

Name _____ Date of Birth _____ Percentage _____ %
Address _____ Social Security Number _____
Relationship _____

Name _____ Date of Birth _____ Percentage _____ %
Address _____ Social Security Number _____
Relationship _____

THE TOTAL PERCENTAGE MUST EQUAL 100%

I/We, being all of the owner(s) of the CEF note(s), acknowledge that we have read and fully understand the instructions on the reverse side of this Beneficiary/Bequest form and hereby request CEF to register the note(s) in beneficiary form, as directed above. I/We understand that the beneficiaries shall receive the note subject to all of the terms contained in this form, the instructions and on the note. I/We also understand and agree that this form and the "Pay on Death" (POD) designation to be stated on the note(s) are binding upon my/our heirs, beneficiaries, and legal representatives at my/our death(s) and shall be construed and applied in accordance with the Uniform Probate Code of South Dakota.

Owner _____ Date _____ Owner _____ Date _____

Spousal Consent (Complete only if Spouse is not an owner.)

I am the spouse of the account holder named above. I give to the account holder any interest I have in the funds deposited in this account. Therefore, I agree to my spouse's naming of a primary beneficiary other than myself. I acknowledge that I have received a fair and reasonable disclosure of my spouse's property and financial obligations. I also acknowledge that I shall have no claim whatsoever against CEF for any payment to my spouse's named beneficiary(ies).

Signature of Account Holder's Spouse Date Spouse of: _____

Beneficiary/Bequest

Instructions:

This form allows the owner(s) of note(s) issued by the Church Extension Fund of The South Dakota District of The Lutheran Church-Missouri Synod ("CEF") to transfer these note(s) to other individuals and/or organizations of the Synod ("the beneficiaries") upon their death. Organizations of The Lutheran Church-Missouri Synod may be named as beneficiaries either alone or jointly with individuals. Please list selected organizations on the spaces provided.

The owner(s) may designate one or more beneficiaries to whom they want to transfer their note(s) at his or her death (or the death of the last surviving owner). When death occurs, the designated beneficiary(ies) will be entitled to the note, as its new owner(s). If only one beneficiary is designated, that beneficiary shall be entitled to the note on the death of the owner(s). If more than one beneficiary is designated, those beneficiaries that survive the owner(s) will each own that percentage of the note that the owner(s) designates upon the death of the owner(s), and if a beneficiary dies, that deceased beneficiary's share will be allocated among the surviving beneficiaries in the proportion that the surviving beneficiaries' designated shares bear to each other. Each note will be changed to state, following your name(s) as owner(s): "POD (name[s] of beneficiaries), no LDPS, as joint tenants with right of survivorship." The use of the phrase "no LDPS" means that if a named beneficiary has predeceased the owner(s), his or her share shall be transferred to the surviving beneficiaries, and not to the descendants of the deceased beneficiary. If only one beneficiary is named and predeceases the owner(s), the property will be transferred to the owner's or the last surviving owner's estate.

In order to make the designation, all owners of the certificate(s) must sign this form. If the spouse of any owner is not also an owner of the certificate(s), that spouse must complete the Spousal Consent.

This form will not be effective until it is signed by all owners.

The trustee of a trust also may be named as a designated beneficiary. Send a copy of the entire signed trust to CEF.

If you wish to name more than four beneficiaries, call our District Business Office at 1-605-361-1514 for assistance.

Beneficiaries may be changed or revoked by the owner(s) at any time and naming beneficiaries does not affect the owner's(s') right to interest payments or to redeem the note(s) at maturity.

**For additional assistance,
call The District Business Office
(605) 361-1514 or Toll Free 1-888-385-7330**



***CHURCH EXTENSION FUND
THE SOUTH DAKOTA DISTRICT
THE LUTHERAN CHURCH -
MISSOURI SYNOD***



**3501 GATEWAY BLVD
P.O. BOX 89110
SIOUX FALLS, SD 57109-9110**