



Lutheran Church Extension Fund

> where investments build ministry

LCEF Beneficiary Designation

This form is for those owning Investments as individuals or joint owners, not for IRA or HSA ownership. Instructions are on next page.

Please Print

Name(s) of Owner(s): _____

Request Applies to:

☐ New Investment

☐ Existing Investment(s): # _____

Spousal Consent - Required

If you are married, and designate someone other than your spouse as your sole primary beneficiary, your spouse must consent to this election by signing below. However, if your spouse is a joint owner on the investment(s) listed above, completion of the spousal consent is not required.

Spousal Consent: I am the spouse of the investment owner named above. I give to the investment owner any interest I have in the investment. 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 LCEF for any payment to my spouse's named beneficiary(ies).

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

List the person(s) or organization(s) such as the ministry of LCEF (national or district), or a congregation and related information to whom you want to transfer your Investment(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 _____	
Organization Name _____	Tax ID Number _____	Percentage _____ %
Address _____		

THE TOTAL PERCENTAGE MUST EQUAL		100%

("I" refers to all owners, whether one or more.)

I understand that the beneficiary(ies) shall receive the Investment(s) subject to all of the terms contained in this form, the instructions, and on the Investment(s). I also understand and agree that this form and the "Payable on Death" (POD) designation to be stated on the Investment(s) are binding upon my heirs, beneficiaries, and legal representatives at my death and shall be construed and applied in accordance with the Nonprobate Transfers Law of Missouri.

I understand that I may change or revoke this beneficiary designation at any time.

Owner _____ Date _____ Owner _____ Date _____

Beneficiary Designation Instructions:

This form allows the owner(s) of Investment(s) issued by the Lutheran Church Extension Fund—Missouri Synod (LCEF), and owner(s) of Investment(s) issued by any Synod District Church Extension Fund (CEF) that are now assumed obligations of LCEF, to transfer the Investment(s) to other individuals and/or organizations of The Lutheran Church—Missouri Synod as beneficiaries who will receive the property upon the death of the owner(s).

- It is important that you provide all requested personal information about your beneficiaries. LCEF will attempt to locate your beneficiaries based on that information.
- You, as the owner(s), may designate one or more beneficiaries to whom your Investment(s) will be transferred upon your death (or the death of the last surviving owner).
- If you are married, and designate someone other than your spouse as your sole primary beneficiary, your spouse must consent to this election by signing the “Spousal Consent” section on the front of this form. However, if your spouse is a joint owner on the investment(s) listed on the form, completion of the spousal consent is not required.
- If a trust is named as a designated beneficiary, you must attach a copy of the *LCEF Trust Certification* (form S00533), available at **lcef.org** or by calling 800-843-5233.
- If you wish to name more than five beneficiaries, contact us.
- Beneficiaries may be changed or revoked by you, the owner(s), at any time. Naming beneficiaries does not affect your right to interest payments or to redeem the Investment(s) at maturity.
- Investments with beneficiaries will include the phrases: Payable on Death Beneficiaries and No LDPS.

The use of the phrase “No LDPS” (no lineal descendant per stirpes) means that if a named beneficiary does not survive the account owner(s), their share of the proceeds passes to the other surviving beneficiary(ies) in the proportion that the surviving beneficiaries’ designated shares bear to each other. If all named beneficiaries predecease the account owner(s), the proceeds will transfer to the estate of the last surviving owner.

- This form will not be effective until it is signed by all owners of the Investment(s).



PO Box 229009 St. Louis, MO 63122-9009 | 800-843-5233 | fax: 314-996-1131 | **lcef.org**