



Complete form & email to: **support@greenfi.com** with subject line: **"Beneficiary Form TOD"**  
Customer may also complete through electronic signature provided by GreenFi Support.

Please complete this form to establish a Transfer on Death Beneficiary on your Fund's account(s). Please complete at least the first three sections (all four if spousal consent is applicable and needed). Please email [support@greenfi.com](mailto:support@greenfi.com) for additional assistance.

If sending by postal mail, send direct to:  
Shareholder Services  
116 S Franklin Street,  
PO Box 4365,  
Rocky Mount, NC 27803-0365.

**All postal mail must be sent to the mail address provided on this form. Postal sent to any other address, including the business address of GreenFi (Mission Financial Partners), may not be processed.**

**Note:** Only accounts registered to individuals or joint tenants, or as community property may designate a TOD beneficiary.

## I. ACCOUNT OWNER INFORMATION

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Primary Owner's Legal Name(s)

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Social Security Number / Date of Birth

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Street Address

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City State Zip

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Telephone Number

**Existing Account(s).** Please fill in the account number(s) and complete the subsequent Sections.

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Account Number



## Beneficiary Form TOD

GreenFi Redwood Fund

### II. BENEFICIARY(IES) INFORMATION

*Individuals or Entities Who Will Receive Funds Upon Death of Account Owner.*

#### **Designation of Primary Beneficiary (ies):**

*Please note total percentage must equal 100%*

1. First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Relationship to Account Holder(s): \_\_\_\_\_  
Percentage: \_\_\_\_\_

2. First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Relationship to Account Holder(s): \_\_\_\_\_  
Percentage: \_\_\_\_\_

#### **Designation of Contingent Beneficiary (ies):**

*Please note total must equal 100%. Please attach additional sheets as needed.*

3. First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Relationship to Account Holder(s): \_\_\_\_\_  
Percentage: \_\_\_\_\_

4. First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Relationship to Account Holder(s): \_\_\_\_\_  
Percentage: \_\_\_\_\_

GreenFi Redwood Fund

### III. BENEFICIARY AGREEMENT

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

I revoke any prior beneficiary(ies) designation, if any, made by me for these assets and I designate the beneficiary(ies) listed in Section 2. This designation is effective upon receipt by the Fund, prior to my death, and will remain in effect until I deliver written notice of a change or revocation of beneficiary(ies) to the Fund and such notice is received by you prior to my death. I agree to be bound by the Securities Transfer Association ("STA") TOD Rules, as may be amended from time to time by the STA or altered, modified, or supplemented by the Fund.

I, my successors and assigns, do hereby agree to indemnify and hold harmless the Fund, its affiliates, and any directors, officers, employees, or agents of these entities, including without limitation each Fund, from and against any and all claims, liabilities, damages, actions, charges, costs, losses, and expenses (including reasonable attorneys' fees) arising out of or resulting from the transfer upon my death of the balance in the account(s) referenced in Section 1 to the beneficiary(ies) listed in Section 2.

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Signature of Owner

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Date

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Signature of Owner

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Date



## Beneficiary Form TOD

### IV. SPOUSAL CONSENT

The spouse of a married shareholder must sign below if he/she is not designated as the sole beneficiary.

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By signing below, I (1) declare that I am the spouse of the above named account holder and (2) hereby consent to and join in the designation of beneficiary(ies) listed above, and (3) agree, for myself and my successors, heirs and assigns, not to assert any claim whatsoever against any mutual funds you advise, any such Fund's transfer agent, distributor, custodian, or any of their respective officers, directors, shareholders, or affiliates in connection with any distribution of assets in any Fund account held by such account holder to any designated beneficiary(ies).

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Signature of Spouse

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Name of Spouse

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Date

*An investment in the GreenFi Redwood Fund is subject to investment risks, including the possible loss of some or the entire amount invested. There can be no assurance that the Fund will be successful in meeting its investment objective. An investment in the Fund is subject to certain risks, including but not limited to:*

- *Sustainability Risk – The consideration of sustainability factors and the application of positive and negative screening processes may impact the investment decisions as to securities of certain issuers and, therefore, the Fund may forgo some investment opportunities available to funds that do not consider sustainability factors or apply positive or negative screening processes, or that apply different sustainability criteria or screening processes.*
  - *Focused Investment Risk – There is a risk that investing in a select group of securities, or securities in a particular sector, could subject the Fund to greater risks of loss and could be considerably more volatile than the Fund's primary benchmark or other mutual funds that are diversified across a greater number of securities or sectors.*

*More information about these and other risks can be found in the Fund's prospectus.*



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### **Beneficiary Form TOD**

*An investor should carefully consider the investment objectives, risks, and charges and expenses of the GreenFi Redwood Fund before investing. The prospectus and summary prospectus contain this and other information about the Fund. Copies of the prospectus and summary prospectus are available at [funds.GreenFi.com](https://funds.GreenFi.com) or by calling Shareholder Services at 800-683-8529.*

*The prospectus and summary prospectus should be read carefully before investing. Current and future holdings are subject to change and risk. Nothing in this email should be considered a solicitation to buy or an offer to sell shares of any fund in any jurisdiction where the offer or solicitation would be unlawful under the securities laws of such jurisdiction.*

*The GreenFi Redwood Fund is distributed by Capital Investment Group, Inc., Member FINRA/SIPC, 100 E. Six Forks Road, Suite 200, Raleigh, North Carolina 27609. The GreenFi Redwood Fund is advised by Mission Investment Advisors. There is no affiliation between Mission Investment Advisors LLC, including their principals, and Capital Investment Group, Inc.*