

Please mail to: Green Century Funds P.O. Box 588 Portland, ME 04112

Overnight Address: Green Century Funds c/o Atlantic Fund Services Three Canal Plaza, Ground Floor Portland, ME 04101

# **Transfer on Death Registration Form**

Use this form to name a beneficiary on your account. If you have questions on how to complete this form, please call 1-800-221-5519 Monday through Friday, 8:00 am to 6:00 pm Eastern Time.

1. Account Information						
Account Number (if known)	Ne	w Account	☐ Existing A	Account 🗌		
Name		<del></del>	Date of Birth	Social	Security	Number
Name (if a joint account with rights of s	survivorship)					
Street Address (Physical Address)		City			State	Zip Code
Mailing Address (if different from above	e)	City			State	Zip Code
U.S. Citizen Resident Alien (0	Country)	<u></u>	aytime Phone	<u></u>	vening Pl	none
2. Beneficiary Designation If you wish to designate addition for the additional beneficiaries.		ase attach	n a piece of pape	er with the	same	information
Name	· · · · · · · · · · · · · · · · · · ·					
Street Address (Physical Address)		City			State	Zip Code
Mailing Address (if different from above	9)	City			State	Zip Code
Birthdate	Social Security Number		% of Acco	unt	<del></del>	

### 3. Signature

The undersigned, residents of the state indicated above, have read and understand and agree to be bound by the attached Guidelines for TOD Registration and hereby instruct the Green Century Funds and its transfer agent to register the accounts listed above, in transfer on death form, subject to the TOD regulations of the Securities Transfer Association as now or hereinafter in effect, for the benefit of the beneficiary designated above. Each of the undersigned hereby agrees to indemnify the Green Century Funds and its transfer agent against any loss, claim, or expense (including reasonable attorney's fees) to the extent that any transfer on death effected pursuant to these instructions is alleged or found for any reason to have been invalid or ineffective for any reason, and the Green Century Funds and/or its transfer agent will be entitled to attach or debit the account of the TOD beneficiary to the extent necessary to enforce their rights to this indemnity.

Signature of Owner	Date
Signature of Owner (if Joint Account)	Date

## Guidelines for Transfer on Death (TOD) Registration

#### **Eligible Owners**

The Transfer on Death (TOD) registration format can only be used for (1) sole owner accounts for natural persons, and (2) natural persons holding the shares as joint owners with rights of survivorship (i.e., JT WROS or TEN ENT). TOD registration is not available for nonnatural persons (e.g., corporations, trusts, associations), tenants in common or community property registrations.

#### **Eligible Beneficiaries**

The beneficiary on a TOD registration can be a natural person or other entity such as a trust, corporation or guardianship. If more than one beneficiary is designated on the TOD account, upon the death of the last surviving account owner(s) the surviving beneficiaries will be considered to own a proportionate share of the account. Custodians under The Uniform Transfers to Minors Act are permitted beneficiaries in a TOD registration. Custodians under the Uniform Gifts to Minors Act are not permitted beneficiaries in a TOD registration (because the UGMA only applies to gifts made during the lifetime of the account owner). No designation such as Lineal Descendants or Lineal Descendants Per Stirpes are permitted. Until the account owner(s) dies, the named beneficiary has no rights in the shares in the TOD account and no instructions can be accepted from, or information provided to, such beneficiary. If the beneficiary fails to survive the account owner, the account will be treated as belonging to the owner's estate. If the beneficiary survives the owner but is not alive at the time the shares are presented for transfer, the shares become part of the beneficiary's estate.

#### Transfer and Revocation During Life of Owner(s)

The owner(s) of the account may change or revoke the TOD registration with clear written instructions to the Green Century Funds, P.O. Box 588, Portland, ME 04112. The surviving owner(s) must provide the Fund and its transfer agent with evidence of the death of the deceased co-owner (certified death certificate) and inheritance tax waivers and/or affidavits of domicile of the deceased co-owner, if applicable.

Neither the Green Century Funds nor its transfer agent are responsible for determining the tax and legal consequences to you concerning your decision to register your fund shares in TOD form. Neither the Funds nor its transfer agent shall be responsible to a designated TOD beneficiary for dividends or distributions in respect of shares registered in TOD form paid after the owner's death but before the transfer of such shares to the designated beneficiary.

#### **Future Changes in These Guidelines**

These guidelines are subject to change by the Green Century Funds and its transfer agent in response to changes in TOD statutes as adopted in several states and in the Securities Transfer Association's TOD Rules.