

MB LOAN FUND CERTIFICATE CHANGE REQUEST

SECTION I: CURRENT CERTIFICATE INFORMATION

Certificate Number

Primary Owner

Joint Owner (if applicable)

SECTION II: CHANGE IN OWNERSHIP INFORMATION

NEW ADDRESS, PHONE, EMAIL. Complete below to change your contact information with MBLF.

Mailing address

City, State, Zip

Phone Number

Home Cell Work

Email Address

ADD JOINT OWNER. If you check this box, MBLF will add the individual identified below as a joint owner with the right of survivorship of the Certificate identified in Section I.

Added Owner's Full Name

Social Sec. Number

REMOVE JOINT OWNER. If you check this box, MBLF will remove the individual identified below as a joint owner of the Certificate identified in Section I.

Removed Owner's Full Name

TRANSFER OWNERSHIP TO LIVING TRUST.

If you check this box, MBLF will transfer ownership of the Certificate identified in Section I to the trustee(s) of the trust identified below.

Name of Trust (including date)

Trust EIN

Name of Trustee

Name of Additional Trustee (if applicable)

Name of Additional Trustee (if applicable)

If the trust has more than one trustee, identify all of them above, and select one of the following:

- Less than all trustees **MAY** exercise trust powers;
 Less than all trustees **MAY NOT** exercise trust powers;

CHANGE ACCOUNT NAME

New Name

SECTION III: CHANGE IN PAY ON DEATH

PRIMARY BENEFICIARY. By checking this box, you authorize MBLF to pay the principal and accrued interest on your Certificate to the 501(c)(3) tax-exempt organization or beneficiaries identified below at your death.

Name of tax-exempt organization or individual beneficiary

Address

City, State and Zip

Social Security No. or EIN

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Main Phone

CONTINGENT BENEFICIARY. You may designate a contingent beneficiary to receive the principal and accrued interest on your Certificate at your death, in the event that the designated beneficiary predeceases you.

Name of contingent beneficiary

Address

City, State and Zip

Social Security No. or EIN

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Main Phone

If you have completed Section III, please review Paragraph 6 of Section IV (on the other side of this page) carefully and complete it as necessary.

SECTION IV: REPRESENTATIONS AND AGREEMENT

BY SIGNING BELOW, YOU REPRESENT AND AGREE TO THE FOLLOWING:

- 1. **Change to Certificate.** By signing below, the Primary Owner and Joint Owner (if any)
 - (a) represent that they are all of the Owners of the Certificate identified in Section I;
 - (b) agree to the changes indicated in this Certificate Change Request; and
 - (c) authorize MBLF to make the changes in this Certificate Change Request to the Certificate identified in Section I.
- 2. **Terms of Certificate.** By signing below, each New Owner represents that he or she understands the terms of the Certificate identified in Section I and agrees to be bound by those terms.
- 3. **Addition of Joint Owner.** If a joint owner is being added to the Certificate identified in Section I, the joint owner identified in Section II (the "Added Owner") must sign below as a New Owner. Each Current Owner and the Added Owner acknowledge that MBLF is authorized to act upon the instructions and directions of any owner in all matters, including redemption requests.
- 4. **Certification of Trust.** If ownership of the Certificate is being transferred to a living trust, each trustee identified in Section II (a "Trustee") must sign below as a New Owner. By signing below, each Trustee certifies that the trust powers may be exercised as indicated in Section II, and that the trust identified in Section II has not been revoked, modified, or amended in any manner that would cause this certification of trust to be incorrect.
- 5. **Withholding Certification.** Under penalties of perjury, each undersigned New Owner certifies that:
 - (a) the Social Security Number or Trust EIN listed under in Section II is correct; and
 - (b) he or she or the Trust identified in Section II (as the case may be) is either exempt from withholding or otherwise not subject to backup withholding. The IRS has not notified the New Owner that part of his or her or the Trust's dividend and interest is to be withheld as a result of a failure to report all

dividend and interest income. **Please draw an "X" through this paragraph if you ARE subject to backup withholding.**

- 6. **Beneficiaries.** If Section III is completed, the Current Owners, by signing below, authorize MBLF to pay the outstanding principal and accrued interest on the Certificate identified in Section I to the designated beneficiary or contingent beneficiary at the death of the last of the Current Owners to die. MBLF may make this payment to the contingent beneficiary if the designated beneficiary is an individual who predeceases the Current Owners or an organization that no longer functions as a qualified 501(c)(3) organization with a mission purpose consistent with the intended donation. MBLF reserves the right to refuse a donation request to an organization that, in MBLF's discretion, is contrary to the mission of the U.S. Conference. The beneficiary designation in Section III may be changed or revoked at any time. But a beneficiary designation and this Purchase Application and Agreement shall be binding on the Current Owners' heirs, beneficiaries and legal representatives. **In addition, each Current Owner represents either (i) that he or she is unmarried, or (ii) that his or her spouse has signed either this Certificate Change Request as a Current Owner, or the following Spousal Consent:**

I am the spouse of the Primary Owner or Joint Owner identified in Section I of this Certificate Change Request. I give to my spouse any interest I have in the funds invested in the Certificate identified in Section I. I agree to my spouse naming a beneficiary other than myself. I acknowledge that I have received a fair and reasonable disclosure of my spouse's property and financial obligations. I shall have no claim against MBLF or any beneficiary designated under this Certificate Change Request for any payment made to the beneficiary.

Signature of spouse of Primary Applicant Date

Signature of spouse of Joint Applicant Date

SIGNATURES

If a change in ownership has occurred, MBLF will not process this request until each person identified in Section I and each person identified in Section II has signed below.

CURRENT OWNERS: The Primary Owner and Joint Owner (if any) identified in Section I must sign below.

Primary Owner's Signature Date

Joint Owner's Signature Date

ADDED/REMOVED OWNERS: Any person identified in Section II must sign below.

Added/Removed Owner's Signature Date

Added/Removed Owner's Signature Date

Print Name

Print Name

Added/Removed Owner's Signature Date

Added/Removed Owner's Signature Date

Print Name

Print Name