

**JOHNSON MUTUAL FUNDS TRUST**

**3777 WEST FORK ROAD  
CINCINNATI, OHIO 45247  
(513) 661-3100  
(800) 541-0170  
(513) 661-3160 FAX**



**JOHNSON**  
MUTUAL FUNDS

For Internal Use  
A/C#

**TRANSFER ON DEATH (TOD)  
BENEFICIARY FORM**

**AGREEMENT**

Pursuant to the Uniform Transfer-on-Death Security Registration Act, and in accordance with section 1709.01 – 1709.11 of the Act, I (we) hereby declare that this account # \_\_\_\_\_ with the Johnson Mutual Funds and the securities\* contained within, is registered as an  Individual Account or  Joint Account with Rights of Survivorship, and that I (we) are hereby naming a transfer-on-death beneficiary.

The current account registration is as follows:

\_\_\_\_\_  
Account Owner

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Account Owner

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Address of Record

\_\_\_\_\_  
Securities owned\*  
(JG, JO, JR, JF, JM, JDS, JDL, JDG, JEI, Other)

\_\_\_\_\_  
City/State/Zip Code

**TOD BENEFICIARY DESIGNATION**

Subject to the limitations of section 5731.39 of the Revised Code, upon the death of the above named owner(s), ownership of the securities in the above named account shall pass to the beneficiary(ies) who survive the owners upon proof of death of the owner or both owners if this account is a Joint Account with Rights of Survivorship. If the beneficiary(ies) herein named fail to survive the owner(s) and LDPS has been designated, the ownership shall pass to the named beneficiary(ies) lineal descendents per stirpes. (If you would like to add more beneficiaries than the space provided, please attach a sheet containing the appropriate information).

**Beneficiary Designation:**

**Beneficiary Designation:**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip Code

\_\_\_\_\_  
City/State/Zip Code

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
% Allocation

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
% Allocation

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Social Security Number

\*Securities may be added to the account after the initial registration and shall pass according to this agreement.

