

Change of Beneficiary Designation Form IRA or 403(b)



For use with Invesco National Trust Company (INTC) Custodial retirement plans.

- Please complete this form if you have an INTC IRA or 403(b) account and would like to change the beneficiary designations for that account.
- We recommend you speak with a tax or financial advisor prior to designating or changing the designation of your beneficiary(ies).

PLEASE USE BLUE OR BLACK INK

PLEASE PRINT CLEARLY IN BLOCK CAPITAL LETTERS

1 Account Registration

Full Name of Owner

SSN

 - -

Existing Account Number or Plan ID

2 Beneficiaries

- I hereby designate the following primary beneficiary(ies) to receive any assets remaining in my account upon my death in equal amounts unless otherwise indicated below.
- In the event that no primary beneficiary(ies) listed below survives me, any assets remaining in my account shall be distributed to the contingent beneficiary(ies) in equal amount unless otherwise indicated below.
- If no primary beneficiary is designated or no designated beneficiary or contingent beneficiary survives me, any assets remaining in my account shall be distributed to my surviving spouse; however, if I am unmarried at the time of my death, any assets remaining in my account shall be distributed to my estate.
- This designation of beneficiary(ies) and any subsequent change in designation must be received by Invesco Aim Investment Services, Inc. prior to my death in order to be effective.
- This designation revokes any prior designation.
- I retain the right to revoke this designation.

Primary

Contingent

Beneficiary's Full Name

Percentage %

SSN or TIN (Required)

 - -

Primary

Contingent

Beneficiary's Full Name

Percentage %

SSN or TIN (Required)

 - -

Primary

Contingent

Beneficiary's Full Name

Percentage %

SSN or TIN (Required)

 - - 

Beneficiaries (Continued)

Primary Contingent

Beneficiary's Full Name

Percentage %

SSN or TIN (Required)

- -

(If you have additional beneficiaries please attach a separate page including all of the information in Section 2.)

3 Signature

Signature of Account Owner

Date (mm/dd/yyyy)

/ /

Submit form to:

After completing the form, please sign it and send it to one of the addresses detailed below.

(Direct Mail)

Invesco Aim Investment Services, Inc.
P.O. Box 4739
Houston, TX 77210-4739

(Overnight Mail)

Invesco Aim Investment Services, Inc.
11 Greenway Plaza, Ste. 100
Houston, TX 77046

For additional assistance please contact an Invesco Aim Client Services Representative at 800 959 4246, weekdays, 7 a.m. to 6 p.m. Central Time.

Visit our Website at invescoaim.com

The Invesco Aim website gives you 24-hour access to your mutual fund account. By using the website, you can obtain the most up-to-date information about your account.

- Check daily and quarterly account balance
- Confirm your account transaction history
- View account statements and tax forms
- Sign up for eDelivery of statements, prospectuses, reports and tax forms
- Check the current fund price, yield and total return on any fund
- Process transactions
- Retrieve account forms and investor education materials

Invesco Aim 24-Hour Automated Investor Line 1-800-AIM-LINE or 800 246 5463

The Invesco Aim Investor Line gives you 24-hour toll-free access to your mutual fund account. By calling the Invesco Aim Investor Line any day of the week, 24 hours a day, you can obtain the most up-to-date information about your account.

Simply dial 1-800-AIM-LINE or 800 246 5463. To use the system, please have your account numbers and Social Security number handy.

- Obtain fund prices
- Confirm your last three transactions
- Order a recent account statement(s)
- Verify your account balance
- Process transactions
- And More