GIFT OR TRANSFER OF SHARES

Please do not use for IRA Accounts

Weitz | INVESTMENT MANAGEMENT

MAILING ADDRESS
Weitz Funds
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Cincinnati, OH 45246

OVERNIGHT MAILING ADDRESS
Weitz Funds
225 Pictoria Dr, Suite 450
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clientservices@weitzinvestments.com

Use this form to make a gift or transfer of shares to an individual or a non-profit organization or for re-registration (name change, divorce/separation, individual to trust, etc.). **Additional documentation and/or a Medallion Signature Guarantee may be required.** Please type or print clearly.

1. Account Information

Account Owner Name

SSN ☐☐☐☐☐☐☐☐☐

Birth Date (MM-DD-YYYY) ☐☐–☐☐–☐☐☐☐

Joint Account Owner Name

SSN ☐☐☐☐☐☐☐☐☐

Birth Date (MM-DD-YYYY) ☐☐–☐☐–☐☐☐☐

Account Number

Daytime Telephone

Email Address

2. Reason for Transfer

Please select the reason for transfer.

☐ **Re-registration**
Additional documentation may be required. Examples include:

- Joint to Individual Account – Divorce decree or court order
- Individual to Trust Account – Title page, trustees page and signature page of the trust agreement, or a certification of trust

☐ **Death (Inheritance) –** A copy of death certificate is required

☐☐–☐☐–☐☐☐☐
Death Date (MM-DD-YYYY)

☐ **Gift**

X _____
Fair Market Valuation Acceptance | *Signature of New Owner*

If the recipient's existing account or new account will use the **Average Cost accounting method**, they must sign above indicating acceptance of the shares valued at fair market value of the date of gift or settlement date if the shares are transferred at a loss.

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3. Transfer Instructions

TRANSFER FROM:

Indicate the fund and amount (dollars OR shares OR % of account) below.
Note: Shares may only be transferred within the same fund.

_____ ☐ $ _____ , ☐ _____ shares, or ☐ _____ % of account
Fund Name / Number

_____ ☐ $ _____ , ☐ _____ shares, or ☐ _____ % of account
Fund Name / Number

_____ ☐ $ _____ , ☐ _____ shares, or ☐ _____ % of account
Fund Name / Number

TRANSFER TO:

☐ Existing Account

_____
Name of Individual or Non-Profit Organization

_____
Existing Account Number

☐ New Account
The new owner must complete a Regular Account Application

4. Signature

If this document is signed electronically, I consent to be legally bound by this document and subsequent terms governing it. The electronic copy of this document should be considered equivalent to a printed form in that it is the true, complete, valid, authentic and enforceable record of the document, admissible in judicial or administrative proceedings. I agree not to contest the admissibility or enforceability of the electronically stored copy of this document. Note that this document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.

X _____ _____
Signature of Owner/Authorized Signer Date

X _____ _____
Signature of Owner/Authorized Signer Date

X _____ _____
Signature of Owner/Authorized Signer Date

X _____ _____
Signature of Owner/Authorized Signer Date