

GIFT OR TRANSFER OF SHARES

Please do not use for IRA Accounts

MAILING ADDRESS

Weitz Funds
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OVERNIGHT MAILING ADDRESS

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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

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Birth Date (MM-DD-YYYY)

Joint Account Owner Name

SSN

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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

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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.

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

New Account

The new owner must complete a Regular Account Application

Name of Individual or Non-Profit Organization

Existing Account Number

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