TRANSFER ON DEATH (TOD)

Please do not use for IRA Accounts

Weitz | INVESTMENT MANAGEMENT

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Use this form to establish or change Transfer on Death (TOD) beneficiary(ies) on your nonretirement account. TOD registration enables account assets to be transferred to the named beneficiary(ies) in the event of your death or, in the case of joint owners, the death of the last surviving owner. Only accounts registered as individual or joint tenants with rights of survivorship may designate a TOD beneficiary. 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. Beneficiary Designation

Please select one of the following options:

☒ I am opening a TOD Beneficiary account ☐ I am adding a TOD Beneficiary to my account ☐ I am revoking my current TOD beneficiary designation and naming a new beneficiary(ies)

A. PRIMARY BENEFICIARY(IES)

If designating more than one beneficiary, failure to identify the percent allocable to each beneficiary will result in equal allocation among the beneficiaries. The total allocated must equal 100%.

Beneficiary 1

Name Percentage %

SSN ☐☐☐☐☐☐☐☐☐ Birth Date (MM-DD-YYYY) ☐☐–☐☐–☐☐☐☐

Relationship

Address

City State ZIP

Beneficiary 2

Name Percentage %

SSN ☐☐☐☐☐☐☐☐☐ Birth Date (MM-DD-YYYY) ☐☐–☐☐–☐☐☐☐

Relationship

Address

City State ZIP

SECTION CONTINUED →

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Beneficiary 3

Name _____ Percentage _____ %

SSN ☐☐☐☐☐☐☐☐☐ Birth Date (MM-DD-YYYY) ☐☐-☐☐-☐☐☐☐

Relationship _____

Address _____

City _____ State _____ ZIP _____

Beneficiary 4

Name _____ Percentage _____ %

SSN ☐☐☐☐☐☐☐☐☐ Birth Date (MM-DD-YYYY) ☐☐-☐☐-☐☐☐☐

Relationship _____

Address _____

City _____ State _____ ZIP _____

Please attach a page **listing additional beneficiaries** with their identifying information, if needed.

B. CONTINGENT BENEFICIARY(IES)

If designating more than one beneficiary, failure to identify the percent allocable to each beneficiary will result in equal allocation among the beneficiaries. The total allocated must equal 100%.

Beneficiary 1

Name _____ Percentage _____ %

SSN ☐☐☐☐☐☐☐☐☐ Birth Date (MM-DD-YYYY) ☐☐-☐☐-☐☐☐☐

Relationship _____

Address _____

City _____ State _____ ZIP _____

Beneficiary 2

Name _____ Percentage _____ %

SSN ☐☐☐☐☐☐☐☐☐ Birth Date (MM-DD-YYYY) ☐☐-☐☐-☐☐☐☐

Relationship _____

Address _____

City _____ State _____ ZIP _____

Beneficiary 3

Name _____ Percentage _____ %

SSN ☐☐☐☐☐☐☐☐☐ Birth Date (MM-DD-YYYY) ☐☐-☐☐-☐☐☐☐

Relationship _____

Address _____

City _____ State _____ ZIP _____

Beneficiary 4

Name _____ Percentage _____ %

SSN ☐☐☐☐☐☐☐☐☐ Birth Date (MM-DD-YYYY) ☐☐-☐☐-☐☐☐☐

Relationship _____

Address _____

City _____ State _____ ZIP _____

Please attach a page **listing additional contingent beneficiaries** with their identifying information, if needed.

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3. Terms and Conditions of Transfer on Death (TOD) Designation

I. You, the shareowner, may designate one or more than one beneficiary of the TOD account. Beneficiaries are not "account owners" as the term is used herein. Weitz Funds must receive a Social Security Number (SSN) for each beneficiary to ensure that your account is transferred to the appropriate person(s) upon the death of the last surviving shareowner.

II. You may designate primary and contingent beneficiaries on your TOD account. Primary beneficiaries are the first to receive the account upon your death. Contingent beneficiaries receive the account upon the death of the shareowner if there are no surviving primary beneficiaries. You do not have to designate any contingent beneficiaries.

III. Minors may be beneficiaries of a TOD account only if a custodian, trustee, or guardian is set forth for the minor. By not providing a custodian, trustee or guardian, the shareowner is representing that all the named beneficiaries have reached the age of majority in their state and therefore are not minors.

IV. Beneficiaries have no rights to this account until your death or, in the case of joint owners, the death of the last surviving owner. To distribute or transfer the account, a copy of the Death Certificate, signature guaranteed letter from the beneficiaries, and a completed W-9 or application must be provided.

V. If more than one person is the owner of an account registered or to be registered TOD, the joint owners of the account must own the account as joint tenants with the rights of survivorship.

VI. You may revoke or change a beneficiary designation only by completing a new "Transfer on Death" form signed by you and all of the joint owners of the account if applicable.

VII. The persons set forth as the beneficiaries of your account shall remain the beneficiaries of the account and events subsequent to the registration of the account as a TOD account shall not change either the rights of the persons designated as beneficiaries or the status of the account, unless Weitz Funds is expressly instructed by you to change the status of the account or the beneficiary designation prior to your death. The beneficiary designation may not be revoked by you by the provisions of a Will or a codicil to a Will.

VIII. Dividends, interest, and other capital gains after your death.

- A. Accruals to your account which occur after your death, or, in the case of joint owners, the death of the last surviving owner, in the account when it is re-registered to the beneficiary(ies), stay with the account and pass to the beneficiary(ies).
- B. If the account has been coded for cash distributions, and such distributions have been paid out prior to notice to Weitz Funds of your death, such distributions are deemed to be the property of your estate and do not pass with the account to the beneficiaries.

IX. TOD registrations may not be made irrevocable.

By providing you these terms, Weitz Funds is not giving any advice as to the legal effect of a TOD registration under applicable state laws governing inheritance and probate procedures. Since TOD directions do affect the disposition of your property at death, you should consult your attorney to make certain that the direction is consistent with your estate and tax planning.

4. Signature

I have read, understand and agree to be bound by the terms and conditions outlined herein. I, on behalf of myself and my successors, heirs, and beneficiaries hereby agree to indemnify, defend, and hold harmless Weitz Funds and its agents against any loss, claim, damage, settlement amount, or expense (including attorney's fees) to the extent that a TOD effected according to these instructions is alleged or found to be unlawful, invalid, or ineffective for any reason. Weitz Funds will be entitled to attach or debit the account of the TOD beneficiary to the extent necessary or appropriate to enforce their rights to indemnity hereunder.

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

ALL ACCOUNT OWNERS ARE REQUIRED TO SIGN THIS FORM.