



CONTACT INFORMATION

First Class Mail:
Pacific Funds
P.O. Box 9768
Providence, RI 02940-9768

Overnight Delivery:
Pacific Funds
Attn: Work Management
4400 Computer Drive
Westborough, MA 01581

Phone: (800) 722-2333
Website: www.PacificFunds.com

Use this form to designate or change your Transfer on Death (TOD) beneficiary(ies) on one more of your existing Pacific Funds account(s) registered in your single name or as joint tenants with rights of survivorship.

If my state of residence has not adopted the Uniform TOD Act, I understand that by signing below, this account will be established under the Delaware TOD Security Registration Act.

1. Account Information

Shareholder Name (as it appears on account statement)

Account Number

Daytime Telephone Number

2. Instructions

Please select one of the options below as your instruction to Pacific Funds:

- Designate a TOD beneficiary(ies) on the account(s) identified in Section 1.
- Change the previously designated TOD beneficiary(ies) on the account(s) identified in Section 1.

3. Beneficiary Designation

Please complete the below Beneficiary Designation. The account owner(s) may not be listed as a beneficiary. The total primary beneficiary percentage allocation and total contingent beneficiary (if any) percentage allocation must EACH equal 100%. **This designation supersedes any prior beneficiary designations that you have made.**

Please indicate the name(s) of the beneficiary(ies) you wish to designate to receive your account(s) upon your death. You may designate one or more primary and one or more contingent beneficiaries. Primary beneficiaries will share equally unless you specify certain percentages, which must total 100%. No beneficiary (primary or contingent) will receive any shares prior to your death or the death of the last surviving joint tenant (if applicable). If a primary beneficiary does not survive you or the last surviving joint tenant (if applicable), his/her interest passes proportionately to the primary beneficiaries who survive you or the last surviving joint tenant (if applicable), unless your state law 1) dictates a different application, or 2) expressly permits you to designate otherwise and you do so. If no primary beneficiary(ies) survive(s) you or the last surviving joint tenant (if applicable) and you have designated a contingent beneficiary(ies), the contingent beneficiary(ies) will share equally unless you specify certain percentages, which must total 100%. If no beneficiary survives you or the last surviving joint tenant (if applicable), the shares pass to your estate or the estate of the last surviving joint tenant (if applicable). Please note, upon your death, we have no obligation to contact your beneficiary(ies). Additionally, upon your death, if there is any question regarding your beneficiary designation, we reserve the right (but have no obligation) to request non-conflicting instructions from all designated beneficiaries regarding the disposition of the shares.

<u>Name</u>	<u>Birth Date</u>	<u>Type</u>	<u>Relationship</u>	<u>SSN/TIN</u>	<u>Percentage</u>
_____	_____	<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	_____	_____	_____
_____	_____	<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	_____	_____	_____
_____	_____	<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	_____	_____	_____
_____	_____	<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	_____	_____	_____

Community Property Spousal Consent: Consent of the Participant's spouse may be required in a community property or marital property state to effectively designate a beneficiary other than, or in addition to, the Participant's spouse.

Disclaimer for Community and Marital Property States: The Participant's spouse may have a property interest in the account and the right to dispose of the interest by will. Therefore, any sponsors, issuers, depositories and other persons or entities associated with the investments and the Custodian specifically disclaim any warranty as to the effectiveness of the Participant's beneficiary designation or as to the ownership of the account after the death of the Participant's spouse. For additional information, please consult your legal advisor.

I consent to the Beneficiary Designation.

Spouse's Signature (if applicable)

Date

4. Authorization, Certification, and Signature

All registered owners named in Section 1 must sign this form. By signing this form, I acknowledge that I have received and read the current Pacific Funds prospectus. I agree to all its terms and I authorize the instructions in this form. I hold harmless and indemnify Pacific Funds and/or its administrator or sub-administrator; any of its affiliates; and each of their respective directors, trustees, officers, employees, and agents from any losses, expenses, costs, or liability (including attorney fees) that may be incurred in connection with these instructions. I certify that all of the information I have provided in this form is true, complete, and correct.

Designating a TOD beneficiary on your Pacific Funds mutual fund account(s) may have certain tax and/or legal consequences. By signing below, the undersigned hereby agrees that neither the Pacific Funds mutual funds nor their transfer agent, Bank of New York Mellon, is responsible for determining any tax and/or legal consequences concerning his/her decision to designate a TOD beneficiary on his/her Pacific Funds mutual fund account(s). The undersigned also understands he/she should consult with his/her attorney and financial advisor prior to completing this Transfer on Death Registration Form to ensure a TOD registration meets his/her specific estate planning requirements.

The undersigned hereby revokes any and all prior designations of a TOD beneficiary. The undersigned also understands that he/she may change this TOD beneficiary designation at any time by submitting a new Pacific Funds Transfer on Death Registration Form, or remove the designation by submitting new registration instructions, in proper form, to Pacific Funds.

I have read this form and understand and agree to be legally bound by the terms of this form. I also understand that the Custodian, Pacific Funds and their agents will rely on my instructions within this form when accepting my instructions.

SIGN
HERE

Participant's Signature

Date

SIGN
HERE

Participant's Signature

Date

Distributor: Pacific Select Distributors, LLC. (member FINRA & SIPC, registered with MSRB) a subsidiary of Pacific Life Insurance Company.

Shares of Pacific Funds are distributed by the distributor. The distributor is not a bank, and shares of the Fund are not deposits or obligations of, or guaranteed or endorsed by any bank, nor are they federally insured or otherwise supported by the FDIC, the Federal Reserve Board, or any other agency.

Pacific Funds refers to Pacific Funds Series Trust.