

# TRANSFER ON DEATH (TOD) CERTIFICATE

## Bryan Energy Management, LLC

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Investor Name(s): \_\_\_\_\_

- Transfer on Death TOD to: (name) \_\_\_\_\_ (percentage) \_\_\_\_\_  
(TOD is available only for Individuals or JTWROS. If more than one beneficiary, provide additional instructions below.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The following are illustrations of acceptable registrations in beneficiary form:

1. Sole owner-sole beneficiary: John S Brown TOD (or POD) John S Brown Jr.
2. Multiple owners-sole beneficiary: John S Brown Mary B Brown JT TEN TOD John S Brown Jr.
3. Multiple owners-primary and secondary (substituted) beneficiaries:
  - John S Brown Mary B Brown JT TEN TOD John S Brown Jr. SUB BENE Peter Q Brown; or
  - John S Brown Mary B Brown JT TEN TOD John S Brown Jr. LDPS. "LDPS" stands for "lineal descendants per stirpes". This designation substitutes a deceased beneficiary's descendants who survive the owner for a beneficiary who fails to so survive, the descendants to be identified and to share in accordance with the law of the beneficiary's domicile at the owner's death governing the inheritance by descendants of an intestate.

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### \*\*\*Investor(s) signature is required

Investor's Signature: \_\_\_\_\_

Print Investor's Name: \_\_\_\_\_

Investor's Signature: \_\_\_\_\_

Print Investor's Name: \_\_\_\_\_

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Office Use Only:

Date Received: \_\_\_\_\_ Date Entered: \_\_\_\_\_ Initials: \_\_\_\_\_ Investor ID: \_\_\_\_\_