



This form should be used by fund direct shareholders who own shares in a Touchstone Fund through an Individual, Joint (JTWROS) or Transfer on Death (TOD) account. This form does not apply to shareholders who own shares in a Touchstone Fund through a financial intermediary. If you need assistance completing this form, please contact Shareholder Services at 800.543.0407, weekdays between 8:30 a.m. and 7:00 p.m. eastern time.

**Return to:** Touchstone Investments, P.O. Box 534467, Pittsburgh, PA 15253-4467

**Overnight address:** Touchstone Investments, Attention: 534467, 500 Ross Street, 154-0520, Pittsburgh, PA 15262, Phone: 800.543.0407

## A SHAREHOLDER INFORMATION

Existing Touchstone Shareholders seeking to add or update their TOD designation should complete this Transfer on Death (TOD) Designation form.

**Please call 800.543.0407 if you have questions about your specific situation.**

Please Print

Name: \_\_\_\_\_ Daytime Telephone: ( ) \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Social Security Number or Taxpayer ID Number on Current Account: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Email: \_\_\_\_\_

Type of Account (Check One):  Individual  Joint (JTWROS)  TOD

## B SHAREHOLDER'S TRANSFER ON DEATH (TOD) DESIGNATION

I hereby revoke any previous TOD designation.

Complete this section if you wish to change the individual on your Individual, Joint (JTWROS) or TOD account.

Not available for Sole Proprietorship, Trust/Employer, Corporation or Partnership or UGMA or UTMA.

I direct that my Touchstone Funds account be distributed upon my death to the designated individual(s) below. If any designated individual dies before I do, that individual's share will be divided proportionately among the surviving individuals. If any individual survives me but fails to survive the transfer of his or her entire share, then the remaining portion of such individual's share shall be transferred to such individual's estate.

Please print. Note: If the stated percentages do not add to 100%, the individuals' shares will be divided equally.

1. _____	_____	_____	_____	_____
Name	Relationship	Date of birth	SSN	_____ %
_____	_____	_____	_____	_____ %
Address	City	State	Zip Code	Percent designated
2. _____	_____	_____	_____	_____
Name	Relationship	Date of birth	SSN	_____ %
_____	_____	_____	_____	_____ %
Address	City	State	Zip Code	Percent designated
3. _____	_____	_____	_____	_____
Name	Relationship	Date of birth	SSN	_____ %
_____	_____	_____	_____	_____ %
Address	City	State	Zip Code	Percent designated

**C SHAREHOLDER AUTHORIZATION**

**Signature(s)**

I (we) understand that I (we) must carefully review each account confirmation statement or other documentation that I (we) receive to ensure that my instructions have been properly acted upon. If any discrepancies are noted, I (we) agree to notify Touchstone, the Fund or the Transfer Agent in a timely manner, but in no event more than 15 days from receipt of such account confirmation statement. Failure to notify one of the above entities in a timely manner will relieve such entities of any liability with respect to the account change.

**Under penalties of perjury, I (we) certify that:**

1. The number shown on this form is my (our) correct taxpayer identification number(s), (or I am (we are) waiting for a number to be issued to me (us)); and
2. I am (We are) not subject to backup withholding because:
  - a. I am (We are) exempt from backup withholding; or
  - b. I (We) have not been notified by the Internal Revenue Service (IRS) that I am (we are) subject to backup withholding as a result of a failure to report all interest or dividends; or
  - c. The IRS has notified me (us) that I am (we are) no longer subject to backup withholding; and
3. I am (We are) a U.S. citizen or other U.S. person (as defined in the Form W-9 instructions found at www.irs.gov).
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

**The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Additional Account Owner Signature (Required, if applicable)

\_\_\_\_\_  
Date

**Mail to the following:**

**First Class Mail:**

Touchstone Investments  
P.O. Box 534467  
Pittsburgh, PA 15253-4467

**Overnight Mail:**

Touchstone Investments  
Attention: 534467  
500 Ross Street, 154-0520  
Pittsburgh, PA 15262  
800.543.0407

**Customer Service:**

800.543.0407