

# Transfer on Death (TOD)

Account Holder Name: \_\_\_\_\_ Joint Account Holder: \_\_\_\_\_ (If applicable)

Account number: \_\_\_\_\_

I hereby request that Voya Investment Management transfer the above referenced account into a TOD registration with the following beneficiary.

**Beneficiary Name:** \_\_\_\_\_ **Social Security Number:** \_\_\_\_\_

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

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Birthdate:** \_\_\_\_\_

**Note:** If Beneficiary is a minor, please provide custodial information:

**Custodian Name:** \_\_\_\_\_ **Social Security Number:** \_\_\_\_\_

**Address:** \_\_\_\_\_ **City:** \_\_\_\_\_

**State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_ **Birthdate:** \_\_\_\_\_

Account Holder Signature

Date

Signature of Joint Account Holder (if applicable)

Date



Affix medallion signature guarantee stamp here



Affix medallion signature guarantee stamp here



Return completed form to:

**Voya Investment Management**  
**P.O. Box 9772**  
**Providence, RI 02940-9772**

All account owners must sign this form exactly as the account is registered. A Medallion Signature Guarantee is required for each signature. The Medallion Signature Guarantee may be executed by banks, broker dealers, credit unions, national securities exchanges and savings associations which participate in STAMP, SEMP or NYSE-MSP. A notary public is not a substitute for a Medallion Signature Guarantee. The Medallion Signature Guarantee stamp must include the words "SIGNATURE GUARANTEED, MEDALLION GUARANTEED" and otherwise comply with the medallion program requirements.