

STATE FARM FUNDS NON-IRA CHANGE OF OWNERSHIP

This form is used to transfer Non-Tax Qualified funds from one State Farm Mutual Fund account to another State Farm Fund account. This form should not be used for Tax Qualified Accounts (IRA's, ESA's, or MSA's) or the transfer of funds outside of State Farm Funds. If you have any questions or need additional information before completing this form, please call **800-447-0740.**

Please print all information.

NAME(S)		SOCIAL SECURITY N	UMBER
ADDRESS			
TELEPHONE		CURRENT ACCOUNT	NUMBER
AMOUNT TO BE TRANSFERRED			
FUND	PERCENTAGE %	(OR)	NUMBER OF S
FUND	PERCENTAGE %	(OR)	NUMBER OF S
FUND	PERCENTAGE %	(OR)	NUMBER OF S
FUND	PERCENTAGE %	(OR)	NUMBER OF S
FUND	PERCENTAGE %	(OR)	NUMBER OF S
FUND	PERCENTAGE %	(OR)	NUMBER OF S
NEW OWNER REGISTRATION			
You must provide account information for the recipient of the	transfer. Please select one of the options below ar	d complete the app	propriate informati
☐ Transfer the above shares to the existing fund/account nu	mber:		
OWNER(S) NAME			

REASON FOR TRANSFER (Choose one of the following.)	
□ UGMA/UTMA*	
☐ Divorce*	
☐ Death (Inheritance)* Date of death (required)	
For cost basis purposes, the fair market value on the date of dec decedent's estate. Proof of executorship required.	ath will be used unless an alternate valuation date is elected by the executor of the
Alternate valuation date (optional)	
$\ \square$ Check here if this account is owned by spouses and subject t	to state community property rules.
Note: If the current account is registered to more than one owner	er, State Farm will assume equal ownership unless instructed otherwise.
□ Gifi*	
For cost basis purposes, the date of gift will be considered the d	late the transfer occurs.
For gifted shares only: If the receiving account will use the Avera for these shares if the shares are transferred at a loss.	age Cost Accounting method, the recipient must waive the right to use the donor's basis
By signing below, I agree to use the fair market value as of the c	date of the gift for average cost calculation purposes.
SIGNATURES OF RECIPIENT(S)	
RECIPIENT SIGNATURE	DATE (MM/DD/YYYY)
RECIPIENT JOINT OWNER SIGNATURE (IF APPLICABLE)	277 1111 (22 1224)
□ Other*	DATE (MM/DD/YYYY)
□ Other* * Additional documents may be required. CURRENT OWNER OR BENEFICIARY/EXECUTOR S My signature below is my authorization to transfer those assets of	
□ Other* * Additional documents may be required. CURRENT OWNER OR BENEFICIARY/EXECUTOR S My signature below is my authorization to transfer those assets of Farm Mutual Fund account as instructed above. I understand the	SIGNATURE (Required for all transfer types) described herein from the above captioned State Farm Mutual Fund account to a State
□ Other* * Additional documents may be required. CURRENT OWNER OR BENEFICIARY/EXECUTOR S My signature below is my authorization to transfer those assets of Farm Mutual Fund account as instructed above. I understand the using the cost basis method currently on my account.	GIGNATURE (Required for all transfer types) described herein from the above captioned State Farm Mutual Fund account to a State at non-covered shares will be transferred first and then covered shares will be transferre
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Fax: 312-557-3093