

BENEFICIARY CHANGE FORM



I/we hereby request that Church Extension Plan change the beneficiary designation on the following Promissory Note(s).

Note Number(s) Investor Number

Select one:

- Replace current beneficiary(ies)—I/we hereby revoke all prior beneficiary designations.
- Add beneficiary(ies)—The list below supplements, does not replace, the beneficiary designations made by me/us.

1. _____ %
Name of Individual/Organization Social Security Number Share

Relationship Telephone Number Date of Birth Primary Contingent

Address City State Zip

2. _____ %
Name of Individual/Organization Social Security Number Share

Relationship Telephone Number Date of Birth Primary Contingent

Address City State Zip

3. _____ %
Name of Individual/Organization Social Security Number Share

Relationship Telephone Number Date of Birth Primary Contingent

Address City State Zip

4. _____ %
Name of Individual/Organization Social Security Number Share

Relationship Telephone Number Date of Birth Primary Contingent

Address City State Zip

Please list any additional beneficiaries on a separate sheet of paper.

Owner Signature Date

Co-Owner Signature Date

CHANGE OF OWNERSHIP FORM



Church Extension Plan
VISION™

I/we hereby authorize Church Extension Plan to change the ownership of the following Promissory Note(s).

Note Number(s) Investor Number

Please Add the Following Co-Owner

Name of new Co-Owner Social Security Number Date of Birth

Address City State Zip

Relationship Telephone Number Email Address

I understand there may be tax consequences for this change.

New Co-Owner Signature Date

Please Remove the Following Co-Owner

Relinquishing Co-Owner Name

Relinquishing Co-Owner Signature Date

Please check if relinquishing Co-Owner is deceased. Please include copy of death certificate.

Please Leave the Following Co-Owner the Same

Interest earned will be reported under the name and Social Security Number of the following Co-Owner:

Remaining Co-Owner Name Social Security Number

Remaining Co-Owner Signature Date