

# The Permanent Portfolio Family of Funds

## Designation of Beneficiaries For Individual Retirement Accounts

ACCOUNT NUMBER(S) \_\_\_\_\_

### ACCOUNT REGISTRATION

\_\_\_\_\_  
Name

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip Code

\_\_\_\_\_  
Phone Number

### DESIGNATION OF BENEFICIARIES

*I hereby revoke all my prior Designations of Beneficiary and designate the following individual(s) to receive my interest in the Permanent Portfolio Family of Funds Individual Retirement Account in the event of my death:*

#### Primary Beneficiary(ies)

\_\_\_\_\_  
Name of Beneficiary

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Relationship

\_\_\_\_\_  
Percentage

\_\_\_\_\_  
Name of Beneficiary

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Relationship

\_\_\_\_\_  
Percentage

\_\_\_\_\_  
Name of Beneficiary

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Relationship

\_\_\_\_\_  
Percentage

#### Secondary Beneficiary(ies)

\_\_\_\_\_  
Name of Beneficiary

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Relationship

\_\_\_\_\_  
Percentage

\_\_\_\_\_  
Name of Beneficiary

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Relationship

\_\_\_\_\_  
Percentage

\_\_\_\_\_  
Name of Beneficiary

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Relationship

\_\_\_\_\_  
Percentage

**Spousal Consent:** If you name someone other than or in addition to your spouse as primary beneficiary and reside in a community or marital property state, including AZ, CA, ID, LA, NV, NM, TX, WA and WI, your spouse must consent by signing below.

\_\_\_\_\_  
Signature of Spouse

\_\_\_\_\_  
Date

### SIGNATURES

*I retain the right to revoke this Designation and to designate a new beneficiary or beneficiaries at any time by communicating to U.S. Bancorp Fund Services, LLC in writing.*

\_\_\_\_\_  
Signature of IRA Account Owner

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Witness\*

\_\_\_\_\_  
Date

*\*The witness must be someone other than the designated beneficiaries.*

#### REGULAR MAIL

The Permanent Portfolio Family of Funds  
c/o U.S. Bancorp Fund Services, LLC  
P.O. Box 701  
Milwaukee, WI 53201-0701

#### OVERNIGHT DELIVERY

The Permanent Portfolio Family of Funds  
c/o U.S. Bancorp Fund Services, LLC  
615 East Michigan Street, Third Floor  
Milwaukee, WI 53202