



AEI Fund Management, Inc. ■ AEI Trust Advisors and its affiliates
1300 Wells Fargo Place ■ 30 E. Seventh Street ■ St. Paul, MN 55101
phone: (800) 328-3519 ■ fax: (651) 227-7705 ■ email: InvestorServices@aeifunds.com

SURVIVORSHIP CONTACT INSTRUCTIONS

**If you do not reside in Texas or wish for AEI to follow instructions contrary to your estate or will planning instructions please complete the separate AEI TOD Beneficiary Plan*

Investor ID Number: _____ Fund/ DST Name(s): _____

Number of Units: _____

Account Title/Name(s): _____

Date(s) of Birth: _____

Telephone: _____ Email Address: _____

**I understand that this is neither a beneficiary nor TOD registration and additional instruction will be required from the person listed as a contact.*

Date: _____

Signature: _____ Last 4 digits of SSN: _____

Signature: _____ Last 4 digits of SSN: _____

**For units held in an IRA or other qualified plan, please contact your IRA custodian for additional instructions*

Financial Professional Information:

Name: _____ Company Name: _____

Telephone: _____ Email Address: _____

In the event of my passing, or if you have exhausted all reasonable means and are unable to locate me, please contact the following individuals for additional contact information, or instructions with the required supporting documentation to have my AEI units re-registered.

Primary Contact:

Name (s): _____

Telephone: _____ Email Address: _____

Address : _____

Date(s) of Birth: _____

Secondary Contact:

Name (s): _____

Telephone: _____ Email Address: _____

Address : _____

Date(s) of Birth: _____