

Steps to Handle Shareholder Assets After a Loss

We understand this is a difficult time, and we hope the checklist below helps make the process a bit easier.

☐ 1. Notify Computershare

When you're ready, please notify Computershare of the shareholder's passing. You will need to have the following information ready when you contact us:

- › Full name of the deceased shareholder
- › Name of the company in which the shares are held
- › Deceased shareholder's account number (begins with "C" and appears on a recent statement)
- › Deceased shareholder's address

To notify us, visit: <https://www.computershare.com/us/investor-inquiries>

☐ 2. Determine Account Registration

Before gathering legal documents, it's important to check how the account is registered:

- › **Transfer-on-Death (TOD)**: Shares go directly to the named person, no probate needed.
- › **With Right of Survivorship (WROS)**: The surviving account holder automatically inherits the shares.

If the account is registered as TOD or WROS (also known as Joint Tenants or Tenants by Entirety), you can skip ahead to **Step 5** otherwise, continue to **Step 3**.

☐ 3. Obtain Legal Documents

You'll usually need official court documents that give someone legal permission to manage the shareholder's account after they pass away, such as:

- › The Will (if there is one)
- › Letters of Administration (if there's no Will)
- › Certified death certificate
- › Affidavit of Domicile (confirms where the person lived)
- › Inheritance Tax Waiver (if your state requires it)

These documents give someone the legal authority to manage or transfer the shares.

☐ 4. Review the Will and Legal Documents

Understand the deceased's wishes for distributing shares:

- › Review the Will to see who is named executor and who the intended beneficiaries are
- › If there isn't a Will, state laws will decide who gets the assets.

☐ 5. Transfer Shares

Begin the process of transferring the shares once all forms and required documents are ready.

- › To transfer shares, visit: <https://transferstock.computershare.com>

This information is not intended as legal or tax advice. If you need assistance, you should consult an attorney or tax advisor regarding your specific situation.