

# Transfer on Death Form

*Not Applicable for Custodial Registrations*

This Transfer on Death (“TOD”) form may be used by any current investor(s) in a KBS Real Estate Investment Trust (“KBS REITs”) to designate the person(s) and/ or entity(ies) to whom the investment should transfer upon the death of the investor(s). **This form must not be used in conjunction with custodial held registrations. Under custodial held registrations, TOD designations of beneficiaries will be collected by the Custodian.**

**If you have questions, please call (866) 584-1381.**

**IMPORTANT NOTICE REGARDING TOD REGISTRATION:**

- [A TOD may only be held on Individual or Joint Tenants with Right of Survivorship \(JTWROS\) registrations.](#)
- The TOD beneficiary must be a named individual or entity and cannot be one of the persons in the JTWROS registrations.
- If one of the named beneficiaries predeceases you, the indicated percentage of shares will be transferred to the named contingent beneficiary on this document. If no contingent is named, the shares will be transferred to your estate, unless you have selected the Lineal Descendants Per Stirpes option located under the beneficiary section of the form or you have completed a new TOD form.
- This agreement is between you and the KBS Real Estate Investment Trust(s) indicated below. You should discuss this TOD with your attorney to ensure that it is consistent with your estate and tax planning and is enforceable under the laws of your state. You should periodically review and consider any outstanding TOD direction to make certain the TOD direction conforms to your current intentions with respect to the disposition of your shares upon your death.
- Your TOD direction is revocable prior to your death by (i) the sale of your shares; (ii) assigning your shares to another person or entity; (iii) filing a revocation of your TOD registration; or (iv) filing a new TOD with new beneficiary(ies). **Your TOD direction may not be revoked by a provision in your will or any other instrument.**
- Upon your death, your shares and any previously declared and unpaid distributions with respect to your shares will be transferred to your designated beneficiary who survives your death and has provided the properly signed and executed transfer paperwork.
- If you reinvest your shares pursuant to a KBS REITs Distribution Reinvestment Plan, the TOD direction with respect to your shares will also apply to shares you subsequently acquire pursuant to the Distribution Reinvestment Plan.
- TOD directions, changes and revocations will only be accepted when in proper form. Proper form requires: (i) endorsement by the investor(s); (ii) instruction indicating either a new form of registration, removal of the current TOD beneficiary and/or designation of new TOD beneficiary; and (iii) actual receipt by KBS REITs prior to your death.
- TOD instructions apply(ies) to the account(s) number(s) indicated below unless otherwise indicated. If you own multiple offerings with different account numbers, please indicate ALL account numbers these instructions should be applied to. If the TOD designation is to be used in conjunction with a transfer to establish a new account, please indicate “New” in the Account No. field.

**1. INVESTOR INFORMATION**

<b>Investor Name</b>		SSN/Tax ID	
<b>Joint Investor Name</b>		SSN/Tax ID	

**2. ACCOUNT INFORMATION**

REIT Name		Account No. (if existing)	
REIT Name		Account No. (if existing)	
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## 3. BENEFICIARY INFORMATION

Lineal Descendants Per Stirpes (LDPS) - Check this box if you wish to have the account passed to the children of the designated beneficiary(ies) in the event the designated beneficiary(ies) predeceases the account owner(s) and no contingent beneficiary(ies) is named.

Primary Beneficiary     Contingent Beneficiary    % of Shares:

Beneficiary Name  SSN

Relationship  DOB

If beneficiary is a minor, please provide name of Guardian

**IF THE BENEFICIARY IS A TRUST, CORPORATION, PARTNERSHIP, PLAN, OR OTHER ENTITY, PLEASE COMPLETE THE FOLLOWING:**

Entity Name  Taxable ID

Trustee(s)/Authorized Officer(s)

Trust     Other (Custodianship, Charity, Corporation, etc.)

Primary Beneficiary     Contingent Beneficiary    % of Shares:

Beneficiary Name  SSN

Relationship  DOB

If beneficiary is a minor, please provide name of Guardian

**IF THE BENEFICIARY IS A TRUST, CORPORATION, PARTNERSHIP, PLAN, OR OTHER ENTITY, PLEASE COMPLETE THE FOLLOWING:**

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Primary Beneficiary     Contingent Beneficiary    % of Shares:

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Trust     Other (Custodianship, Charity, Corporation, etc.)

Primary Beneficiary     Contingent Beneficiary    % of Shares:

Beneficiary Name  SSN

Relationship  DOB

If beneficiary is a minor, please provide name of Guardian

**IF THE BENEFICIARY IS A TRUST, CORPORATION, PARTNERSHIP, PLAN, OR OTHER ENTITY, PLEASE COMPLETE THE FOLLOWING:**

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*Should you have additional beneficiary (primary or contingent) designations, please use the **Additional Transfer on Death Beneficiaries** form, which must be Medallion Signature Guaranteed and sent with this **Transfer on Death Form**.*

## 4. AUTHORIZED SIGNATURE(S)

By signing below, I/we request that my/our investment in KBS REITs be registered in TOD form and designate the above as the party(ies) to whom the investment shall pass after I am/we are deceased. **If no type of Beneficiary is selected, the REIT will deem that the instructions pertain to the Primary Beneficiary. If no percentage of shares is specified and, if one TOD Beneficiary is named, all shares will be deemed to be covered by this instruction for the benefit of such TOD Beneficiary and, if more than one TOD Beneficiary is named, all shares will be deemed to be covered by this instruction in equal parts among the named TOD Beneficiaries or named contingent or LDPS, if beneficiary is deceased. Contingent beneficiaries are only entitled to the percentage of shares listed under the primary beneficiary in which they are listed as a contingent. If either a beneficiary or contingent beneficiary is under the age of 18, a custodian must be provided.**

By signing below, I/we also make the following warranties, representations, and agreements:

- This instruction supersedes all prior instructions regarding the subject matter hereof.**
- Neither KBS REITs nor any of its respective directors, officers, employees or agents is responsible for determining the tax consequences of the decision to register this investment herein.
- KBS REITs is not required to re-register the investment in the name of the beneficiary unless KBS REITs has received such documents as KBS REITs may require to establish that account owner(s) are deceased. For minor beneficiaries KBS REITs, Inc. may require appointment of a guardian/conservator.
- I/We agree that KBS REITs will not be liable for any claims, losses or liabilities resulting from (i) any breach of warranty, representation or agreement in this agreement, or (ii) any action KBS REITs takes in connection with the registration or re-registration in the name of the beneficiary, or any distribution thereafter to the beneficiary or for the benefit of the beneficiary, made as requested or authorized under this agreement.
- If this agreement is established under joint tenants with rights of survivorship, upon the death of one of the joint owners, ownership shall pass to the surviving joint owner, and KBS REITs may follow the instructions of the survivor with regard to the investment, including, without limitation, instructions to (i) revoke the TOD registration or (ii) change an existing TOD registration.
- KBS REITs has not provided any legal, tax or other advice to me. I understand this TOD form may not be enforceable in every jurisdiction. I agree to obtain the advice of an attorney with regard to the enforceability of this form of registration in my state and its effect on my tax and estate planning.

### SIGNATURES:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Printed Name of Investor</i>	<i>Date</i>	<i>Printed Name of Joint Investor</i>	<i>Date</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Signature of Investor</i>	<i>Date</i>	<i>Signature of Joint Investor</i>	<i>Date</i>
<input type="text"/>		<input type="text"/>	
<i>Medallion Signature Guarantee Stamp Here</i>		<i>Medallion Signature Guarantee Stamp Here</i>	
<i>Medallion Signature Guarantee - REQUIRED</i>		<i>Medallion Signature Guarantee - REQUIRED</i>	

**Completed Transfer on Death Form should be sent to:**

**Regular Mail Address:** KBS Real Estate Investments Trusts, c/o DST Systems, Inc., PO Box 219015, Kansas City, MO 64121-9015

**Overnight Mail Address:** KBS Real Estate Investment Trusts, c/o DST Systems, Inc., 430 W. 7th Street, Kansas City, MO 64105

**Should you have questions, please call (866) 584-1381.**

**DO NOT FAX - ORIGINALS REQUIRED**