

EXHIBIT IV.

ATTACHMENT TO DESIGNATION OF BENEFICIARY FORM

(Retirement Account)

To: _____
[Financial Institution]

From: PAUL PARTICIPANT

Social Security No.: _____

Re: Account No.: _____

Primary Beneficiary. All death benefits shall be distributed to my wife, SANDRA SPOUSE, if she survives me.

Contingent Beneficiaries. If my wife, SANDRA SPOUSE, disclaims part or all of the death benefits, the disclaimed portion shall be paid to the Trustee of the JONES Family Trust, which is established under the Section of my revocable trust entitled "Family Trust," for the benefit of my wife and my issue.

If my wife, SANDRA SPOUSE, does not survive me, all death benefits shall be distributed to my issue who survive me, per stirpes, provided that:

1. If a share of the death benefits becomes distributable to my daughter, MELISSA ("MELISSA"), MELISSA's share of the death benefits shall not be distributed to her outright, but instead shall be distributed to the Trustee of the MELISSA JONES DESCENDANT's TRUST, which is established for MELISSA's benefit under the Section of Article III of my revocable trust entitled "Descendant's Trust."
2. If a share of the death benefits becomes distributable to a grandchild of mine, such grandchild's share of the death benefits shall not be distributed outright to the grandchild, but instead shall be distributed to the Trustee of the trust established for the benefit of such grandchild of mine under the Section of Article III of my revocable trust entitled "Descendant's Trust."
3. If a share of the death benefits becomes distributable to a beneficiary (other than MELISSA or a grandchild of mine) who is under the age of thirty (30) at my death, such beneficiary's share of the death benefits shall not be distributed to the beneficiary outright, but instead shall be distributed to the Trustee of the Trust established for the benefit of such beneficiary under the Section of Article III of my revocable trust entitled "Trust for Beneficiary Under Age Thirty."

4. If my wife, SANDRA SPOUSE, does not survive me, and I have no issue who survive me, all death benefits shall be distributed to the Trustee of my revocable trust.

When I refer in this Attachment to my revocable trust, I mean the PAUL PARTICIPANT REVOCABLE TRUST dated July 20th, 2023, and including any amendments thereto in effect at my death.

Family Information

I am married to SANDRA SPOUSE. I have one child, namely MELISSA JONES.

<u>Name</u>	<u>Address</u>	<u>SSN</u>	<u>DOB</u>
SANDRA SPOUSE	_____	_____	_____
MELISSA JONES	_____	_____	_____

Release and Indemnification: The Financial Institution shall be entitled to rely on a certification of the personal representative (executor) of my estate as to the beneficiaries designated above who survive me and who are entitled to take such death benefits in accordance with this beneficiary designation, as well as the correct ages of such beneficiaries at the time of my death, and my estate hold the Financial Institution harmless in distributing the death benefits based on such personal representative's certification.

Date

PAUL PARTICIPANT

ATTACHMENT TO DESIGNATION OF BENEFICIARY FORM

Retirement Account

To: _____
[Financial Institution]

From: PAUL PARTICIPANT

Social Security No.: _____

Re: Account No.: _____

Primary Beneficiary. All death benefits shall be distributed to my wife, SANDRA SPOUSE, if she survives me.

Contingent Beneficiaries. If my wife, SANDRA SPOUSE, does not survive me, all death benefits shall be distributed as follows:

1. Thirty percent (30%) of death benefits shall be distributed to my daughter, MELISSA ("MELISSA"), if she survives me, and if MELISSA predeceases me, to MELISSA's issue who survive me, per stirpes. If MELISSA predeceases me leaving no issue who survive me, this percentage share shall be distributed on a pro rata basis to the beneficiaries identified in such paragraphs 2 and 3 immediately below;
2. Thirty percent (30%) of death benefits shall be distributed to my daughter, JENNIFER ("JENNIFER"), if she survives me, and if JENNIFER predeceases me, to JENNIFER's issue who survive me, per stirpes. If JENNIFER predeceases me leaving no issue who survive me, this percentage share shall be distributed on a pro rata basis to the beneficiaries identified in paragraphs 1 and 3 immediately above and below;
3. Thirty percent (30%) of death benefits shall be distributed to my son, JUSTIN ("JUSTIN"), if he survives me, and if JUSTIN predeceases me, to JUSTIN's issue who survive me, per stirpes. If JUSTIN predeceases me leaving no issue who survive me, this percentage share shall be distributed on a pro rata basis to the beneficiaries identified in such paragraphs 1 and 2 immediately above; and
4. Ten percent (10%) of death benefits shall be distributed to THE TRIANGLE COMMUNITY FOUNDATION (EIN _____), located at PO Box 12728, Durham, NC, or its successor entity;

Provided, however, that if a share of the death benefits becomes distributable to an individual beneficiary who is under the age of twenty-five (25) at my death, such beneficiary's share of the death benefits shall not be distributed to him or her outright, but instead shall be paid to the

Trustee of the Trust established for the benefit of such beneficiary under the Section of my revocable trust entitled "Trust for Beneficiary Under Age Twenty-Five."

When I refer in this Attachment to my revocable trust, I mean the PAUL PARTICIPANT REVOCABLE TRUST dated July 20th, 2023, and including any amendments thereto in effect at my death.

Family Information

I am married to SANDRA SPOUSE. I have three children, namely MELISSA, JENNIFER, and JUSTIN.

<u>Name</u>	<u>Address</u>	<u>SSN</u>	<u>DOB</u>
SANDRA SPOUSE	_____	_____	_____
MELISSA	_____	_____	_____
JENNIFER	_____	_____	_____
JUSTIN	_____	_____	_____

Release and Indemnification: The Financial Institution shall be entitled to rely on a certification of the personal representative (executor) of my estate as to the beneficiaries designated above who survive me and who are entitled to take such death benefits in accordance with this beneficiary designation, and my estate shall hold the Financial Institution harmless in distributing the death benefits based on such personal representative's certification.

Date

PAUL PARTICIPANT