

Change of Ownership Form

1. INSTRUCTIONS

This form is used to update ownership of shares within the fund.

- · A new account application will be required unless the receiving account has previously been established
- In the event of the death of a shareholder, a certified copy of the death certificate will be required along with court letters testamentary (unless the account is titled as Joint Tenants With Right of Survivorship or an IRA with listed beneficiaries)
- Mail this completed form and any additional required paperwork to:

StepStone Private Wealth Attn: Transfer Agent

P.O. Box 2175 Milwaukee, WI 53201-2175

indicated by filling in the decedent's portion of account assets.

or Overnight Delivery to:

StepStone Private Wealth Attn: UMB Fund Services 235 W. Galena Street Milwaukee, WI 53212

Contact us at: 1-866-704-0897

Fund:	StepStone Private Markets	StepStone Private Venture & Growth			
Shareholder Name		Joint Shareholder Name (If Applicable)			
Mailing Address		City	State	Zip Code	
Account Number	Telephone (Day)		Telephone (Evening)		
3. TRANSFE	R DETAILS				
	the Emergency Economic Stabilization Act, HR1 tension Act of 2008, requiring mutual funds to	<u> </u>	•	the Energy	
To ensure accurate o	ost basis reporting, indicate the type of transfe	er requested and provide tr	ansfer details where applicable.		
☐ Re-regis	tration (Minor reached age of majority, divorce	, etc)			
	d due to death. Date of death or alternate valueld in Joint Ownership form proceed to section		(if	the account is	
	hares. Date of gift f the shares must sign below to accept the shar		nt has average cost set as the co the date of gift if the shares are		
F	air market value acceptance:				
4. DEATH O	F JOINT OWNER				
	n if the account was jointly owned with anothe al factors be taken into consideration when an			RS regulations	
Note: If the below in	formation is not provided, the transferred sha	ares will be considered to l	be uncovered until such informa	ation is provided.	
For accounts with 2 c	owners, were the shareholders legally married	for federal tax purposes at	the time of death?	□No	
•	of the account:	te valuation date provided		who were legally	

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