



LOANS • INVESTMENTS • GROWTH

BENEFICIARY DESIGNATION

1. INVESTOR INFORMATION

Owner
Co-Owner (if applicable)
Mailing Address
City
State
Zip
Phone: #1 #2
E-Mail

2. WHO ARE YOUR BENEFICIARIES?

It is very important to clearly indicate your beneficiaries. If multiple beneficiaries are named and no percentage of distribution is noted, then any proceeds payable to such beneficiaries will be split equally.

3. BENEFICIARY DESIGNATION

I designate that upon my death, the assets in this account be paid to the beneficiaries named below. The interest of any beneficiary that predeceases me terminates completely, and the percentage share of any remaining beneficiaries will be increased on a pro rata basis.

PRIMARY BENEFICIARIES (The total percentage designated must equal 100%)

Name
Address
City/State/Zip
Tax ID
Date of Birth
Relationship
Percent Designated

Name
Address
City/State/Zip
Tax ID
Date of Birth
Relationship
Percent Designated

Name
Address
City/State/Zip
Tax ID
Date of Birth
Relationship
Percent Designated

Name
Address
City/State/Zip
Tax ID
Date of Birth
Relationship
Percent Designated

CONTINGENT BENEFICIARIES (The total percentage designated must equal 100%. The balance in the account will be payable to these beneficiaries if all primary beneficiaries have predeceased the IRA owner.)

Name
Address
City/State/Zip
Tax ID
Date of Birth
Relationship
Percent Designated

Name
Address
City/State/Zip
Tax ID
Date of Birth
Relationship
Percent Designated

Name
Address
City/State/Zip
Tax ID
Date of Birth
Relationship
Percent Designated

Name
Address
City/State/Zip
Tax ID
Date of Birth
Relationship
Percent Designated

4. ACKNOWLEDGMENT

Community Property State Consent for residents of Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington or Wisconsin. If you are married, live in a community property state, and name someone other than your spouse as Beneficiary, you must have your spouse sign below to waive his or her rights to any community property interest in the benefit.

As the Investors spouse, I do hereby consent to the beneficiary designation(s) indicated on this form and waive any rights that I may have to the proceeds of such investments under applicable community property laws.

Signature of Owner Date Signature of Spouse Date