



# Beneficiary Designation Form

► Email to: [newaccounts@iraclub.com](mailto:newaccounts@iraclub.com)

You can update your beneficiary designations at any time. Completing a new beneficiary designation form will replace any previous forms on file. Your beneficiary designations must be on record with IRA Club before your death to be valid. If you do not know your beneficiary's date of birth or Social Security number, your designation is still valid.

For support, call (312) 795-0988. Office hours are Monday-Friday, 9:00 AM – 4:00 PM. Find information online at [www.iraclub.com](http://www.iraclub.com)

## ACCOUNT OWNER INFORMATION

[CHECK HERE IF NEW ACCOUNT](#)

FIRST AND LAST NAME	IRA CLUB ACCOUNT NUMBER	PHONE NUMBER
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## PRIMARY BENEFICARY DESIGNATION

Primary Beneficiary: An individual or entity you intend to receive your IRA assets upon death

PRIMARY BENEFICIARY NAME	SOCIAL SECURITY NUMBER / TAX ID	DATE OF BIRTH	RELATIONSHIP	DESIGNATED PERCENTAGE %
1.				
2.				
3.				
4.				

## CONTINGENT BENEFICIARY DESIGNATION (OPTIONAL)

Contingent Beneficiary: An individual or entity you designate to receive the benefits from your IRA if your primary beneficiary dies before you or disclaims interest in the IRA.

CONTINGENT BENEFICIARY NAME	SOCIAL SECURITY NUMBER / TAX ID	DATE OF BIRTH	RELATIONSHIP	DESIGNATED PERCENTAGE %
1.				
2.				
3.				
4.				

Upon my death, the assets in this account will be distributed to my beneficiaries, in the percentages indicated above. If any beneficiary predeceases me, their interest in the account will terminate completely, and the percentage shares of the remaining beneficiaries will be increased proportionately. If no beneficiaries are named, my estate will be my beneficiary.

### Please note:

- You may select anyone as a beneficiary. However, if your legal residence is in a community property state, the state's law may give your spouse rights to some or all of your IRA or may require your spouse's consent to name a non-spouse as an IRA beneficiary. For more information, please refer to IRS Publication 555, Community Property (AZ, CA, ID, LA, NV, NM, TX, WA, WI).
- If you named a primary beneficiary other than (or in addition to) your spouse, you hereby represent that your spouse has consented to the above designation(s).



ACCOUNT OWNER'S SIGNATURE	DATE SIGNED
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