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IRA & 403(b) Change of Beneficiary Form

Use this form to update the beneficiary information for your Traditional IRA, Roth IRA, Rollover IRA, SEP IRA, SIMPLE IRA or 403(b) account. If you hold more than one account with us and you provide the lead account number from your quarterly statement, all of your retirement accounts will be updated. If you wish to make separate beneficiary designations for different accounts, please provide the account number for the specific account you wish to change.

Note: If you are an active participant in an Employer’s 403(b) plan, you should provide your employer with a copy of your beneficiary election.

Individual or Joint Tenant non-retirement accounts, please use the Transfer on Death (TOD) Form to update beneficiary designation.

1. Participant Information

Name		IRA or 403(b) Account Number	
Mailing Address		City	State Zip Code
Day Telephone	Evening Telephone		Cell Telephone
Email Address			

Check here if contact information above is new. The new information will replace the information currently on file. To update the name on an account, please include a completed Name Change Form.

2. Participant’s Designation

My previous beneficiary designation will be replaced with the designation below.

Note: The share percentage must equal 100% for all Primary or all Contingent Beneficiaries. If neither the Primary nor the Contingent Beneficiary box is checked, the beneficiary will be deemed to be a Primary Beneficiary. If a trust is designated as a Beneficiary, please also provide the date of the trust.

In the event of my death, the balance in the account shall be paid to the Primary Beneficiaries who survive me in equal shares (or in the specified shares, if indicated). If none of the Primary Beneficiaries survive me, the balance in the account shall be paid to the Contingent Beneficiaries who survive me in equal shares (or in the specified shares, if indicated). I understand that, unless I have specified per Stirpes designations, if I name multiple beneficiaries and a beneficiary does not survive me, such interest is terminated and that percentage will be divided proportionately among the remaining beneficiaries. I understand that I may change my beneficiaries at any time by giving written notice to the Custodian. If I do not designate a beneficiary, or if all designated beneficiaries predecease me, my surviving spouse will become the beneficiary of my IRA. If I do not have a surviving spouse at the time of my death, my estate will become the beneficiary of my IRA.

PER STIRPES BENEFICIARY DESIGNATIONS — The Custodian shall accept as complete and accurate all written instructions provided in good order by the estate/executor with regard to the identification of the beneficiaries and the allocations thereto.

Primary Contingent (please check one) Per Stirpes

Name of Beneficiary (Individual or Trust)		% of Distribution	
Relationship		Birthdate (mm/dd/yyyy) or Date of Trust	
Beneficiary’s Mailing Address	City	State	Zip Code

