

Designated Beneficiary Election

Forward To: 214 West 9th Street
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Please Print or Type

Original IRA Owner Information

Original Owner Name and Address

Account Number _____

Social Security Number _____

Date of Birth _____

Phone Number _____

Date of Death _____

Beneficiary Information

Beneficiary Name and Address

Social Security Number _____

Date of Birth _____

Phone Number _____

Relationship to Original IRA Owner _____

Beneficiary Options

Applies to All Beneficiary Types

- Total Distribution
- Transfer to an Inherited IRA at Mainstar Trust or another Custodian

Applies to Spouse Beneficiaries Only

- Total Distribution
- Roll Over or Transfer to my own IRA
- Roll Over to a Qualified Plan

Beneficiary Election

Defaults to Life Expectancy Payments if no option is selected.

Traditional IRA Beneficiary Election

Original IRA Owner Died Before April 1 of the Year Following the Owner's 70 ½ Year

NON-SPOUSE

- Payments Over 5 Years
- Life Expectancy Payments

SPOUSE

- Payments Over 5 Years
- Life Expectancy Payments
- Treat as My Own

NON-INDIVIDUAL

- Payments Over 5 Years

Original IRA Owner Died After April 1 of the Year Following the Owner's 70 ½ Year

NON-SPOUSE

- Life Expectancy Payments

SPOUSE

- Life Expectancy Payments
- Treat as My Own

NON-INDIVIDUAL

- Payments Over 5 Years
- Life Expectancy Payments

Roth Beneficiary Election

NON-SPOUSE

- Payments Over 5 Years
- Life Expectancy Payments

SPOUSE

- Payments Over 5 Years
- Life Expectancy Payments
- Treat as My Own

NON-INDIVIDUAL

- Payments Over 5 Years

 Beneficiary Signature

 Date