

DESIGNATED BENEFICIARY ELECTION

Forward To: 214 West 9th Street
 PO Box 420
 Onaga, KS 66521-0420
 P) 800.521.9897
 F) 913.901.4190
 customerservice@mainstartrust.com

Please Print or Type

ORIGINAL IRA OWNER INFORMATION

Original Owner Name		Account Number	
Address		Social Security Number	
		Date of Birth	
		Date of Death	
Phone Number			

BENEFICIARY INFORMATION

Beneficiary Name		Social Security Number	
Address		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 becoming 70 ½*

NON-SPOUSE

SPOUSE

NON-INDIVIDUAL

- Payments Over 5 Years
 Life Expectancy Payments

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

- Payments Over 5 Years

*Original IRA Owner Died **After** April 1 of the Year Following the Owner becoming 70 ½*

NON-SPOUSE

SPOUSE

NON-INDIVIDUAL

- Life Expectancy Payments

- Life Expectancy Payments
 Treat as My Own

- Payments Over 5 Years
 Life Expectancy Payments

Roth Beneficiary Election

NON-SPOUSE

SPOUSE

NON-INDIVIDUAL

- Payments Over 5 Years
 Life Expectancy Payments

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

- Payments Over 5 Years

AUTHORIZED SIGNATURE

 Beneficiary Signature

 Date