Scottrade

PO BOX 31759 Saint Louis, MO 63131-0759

SF2113/8-11

IRA DESIGNATION OF BENEFICIARY

The term IRA will be used below to mean Traditional IRA, Roth IRA and SIMPLE IRA, unless otherwise specified.

IRA HOLDER'S NAME AND ADDRESS			IRA TRUSTEE'S OR CUSTODIAN'S NAME AND ADDRESS		
			Scottrade, Inc. PO BOX 31759 Saint Louis, MO 63131-0759		
Social Security Number	**Date of Birth**	**Home Phone**	**IRA Account Identification**	**Type of IRA**	**Trustee's or Custodian's Phone Number**
				☐ Traditional IRA ☐ Roth IRA ☐ SIMPLE IRA	

DESIGNATION OF BENEFICIARY(IES)

NAME/RENAME BENEFICIARY(IES) – I designate the individual(s) or entity named below as my primary and/or contingent beneficiary(ies) of this IRA and hereby revoke all prior beneficiary(ies) designations, if any, made by me.

If neither primary nor contingent is indicated, the individual or entity will be deemed to be a primary beneficiary. If more than one primary beneficiary is designated and no distribution percentages are indicated, the beneficiaries will be deemed to own equal share percentages in the IRA. Multiple contingent beneficiaries with no share percentage indicated will also be deemed to share equally. If any primary or contingent beneficiary dies before me, his or her interest and the interest of his or her heirs shall terminate completely, and the percentage share of any remaining beneficiary(ies) shall be increased on a pro rata basis. If no primary beneficiary(ies) survives me, the contingent beneficiary(ies) shall acquire the designated share of my IRA.

No.	Beneficiary's Name and Address	Date of Birth	Social Security Number	Relationship	Primary or Contingent	Share %
1.					☐ Primary ☐ Contingent	%
2.					☐ Primary ☐ Contingent	%
3.					☐ Primary ☐ Contingent	%
4.					☐ Primary ☐ Contingent	%

SPOUSAL CONSENT

This section should be reviewed if either the trust or the residence of the IRA holder is located in a community or marital property state and the IRA holder is married. Due to the important tax consequences of giving up one's community property interest, individuals signing this section should consult with a competent tax or legal advisor.

CURRENT MARITAL STATUS

☐ **I Am Not Married** – I understand that if I become married in the future, I must complete a new IRA Designation Of Beneficiary form.

☐ **I Am Married** – I understand that if I choose to designate a primary beneficiary other than my spouse, my spouse must sign below.

I am the spouse of the above-named IRA holder. I acknowledge that I have received a fair and reasonable disclosure of my spouse's property and financial obligations. Due to the important tax consequences of giving up my interest in this IRA, I have been advised to see a tax professional.

I hereby give the IRA holder any interest I have in the funds or property deposited in this IRA and consent to the beneficiary designation(s) indicated above. I assume full responsibility for any adverse consequences that may result. No tax or legal advice was given to me by the Trustee or Custodian.

_____ _____
(Signature of Spouse) (Date)

SIGNATURES

I understand that I may change or add beneficiaries at any time by completing and delivering the proper form to the Trustee or Custodian. The Trustee or Custodian has provided no tax or legal advice to me regarding my beneficiary designations.

_____ _____
(IRA Holder) (Date)

_____ _____
(Authorized Signature of Custodian) (Date)

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