

Step 6: BENEFICIARY IRA RMD OPTIONS (CONTINUED FROM PAGE 1)

Required minimum distributions (RMDs) HAD started for the original/deceased account holder.

Please select one of the following options:

- I wish to take distributions based on the oldest beneficiary's life expectancy. *(If you are the oldest beneficiary, your LE will be used)*
- I wish to continue taking distributions in the manner elected by the original account owner

Required information for Beneficiary RMD Calculation:

Name of prior participant/account owner: _____

Date of death of prior participant/account owner: _____

Date of birth of prior participant/account owner: _____

Surviving spouse. If a surviving spouse, register my IRA:

- As a Beneficiary IRA
- In my name (not a Beneficiary IRA)

A non-spousal beneficiary (for non-spousal beneficiary, account will be registered as a Beneficiary IRA).

- I am the oldest beneficiary of this IRA.
- I am not the oldest beneficiary of this IRA.

Date of Birth of Oldest Beneficiary: _____

Step 7: PAYMENT METHOD

Taxable Options:

- Transfer in Kind my shares to my non-qualified account; Existing Account Number _____
 - Create New Account *(Submit new subscription document if non-qualified account does not exist. See product prospectus for requirements.)*
- Mail check to the address currently on file *(Signature Guarantee required if address changed within 30 days.)*
- Electronically transfer funds by ACH to my bank *(Voided check is required for new instructions. Signature Guarantee required if adding bank within 30 days)*
- Mail check to a third party listed below. **Form must be signed and Signature Guaranteed for this payment method. Please note that this form cannot be notarized.**

Non-Taxable Options:

- Deposit cash into my Undirected Cash Account
- Transfer in Kind my IRA; Existing Account Number _____
 - Create New Account *(Must complete an IRA Application to create a new account for Recharacterization or Roth Conversions)*

Payee or Account Name

Account Number

Street Address

City, State & ZIP

Signature Guarantee

