

PERELMAN-CARLEY & ASSOCIATES, INC.

3000 Farnam St., Omaha, Nebraska, 68131
 (402) 342-6000 800-444-5880
 www.pcastocks.com

IRA DESIGNATION OF BENEFICIARY

IRA HOLDER'S NAME AND ADDRESS			IRA ACCOUNT NUMBER			
			TYPE OF IRA			
			<input type="checkbox"/> Traditional IRA		<input type="checkbox"/> SIMPLE IRA	
<input type="checkbox"/> Roth IRA		<input type="checkbox"/> Education IRA				
SOCIAL SECURITY #	DATE OF BIRTH	PHONE #	DESIGNATION OF BENEFICIARIES			
			<p><i>Please check one of the following options.</i></p> <p><input type="checkbox"/> REPLACE BENEFICIARY(IES) - I designate the individual(s) or entity name 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.</p> <p><input type="checkbox"/> ADD BENEFICIARY(IES) - I designate the individual(s) or entity named below as my primary and/or contingent beneficiary(ies) of this IRA. This list supplements, but does not replace, the beneficiary(ies) previously designated by me on _____. <i>(When adding beneficiaries, if the share % of previously designated beneficiary(ies) changes, restate all beneficiaries and the corresponding share % if the previous percentages are no longer correct.</i></p> <p>If neither primary nor contingent is indicated, the individual or entity will be deemed to be a primary beneficiary. 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 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 percentage indicated will also be deemed to share equally. If no primary beneficiary(ies) survives me, the contingent beneficiary(ies) shall acquire the designated share of my IRA.</p>			
No.	Name and Address	Date of Birth	Social Security #	Relationship	Type	Share %
1.					<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	%
2.					<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	%
3.					<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	%
4.					<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	%
5.					<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	%
SPOUSAL CONSENT			SIGNATURE AND DATE			
<p><i>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.</i></p> <p style="text-align: center;">CURRENT MARITAL STATUS</p> <p><input type="checkbox"/> I Am Not Married - I understand that if I become married in the future, I must complete a new IRA Designation of Beneficiary form.</p> <p><input type="checkbox"/> I Am Married - I understand that if I choose to designate a primary beneficiary other than my spouse, my spouse must sign below.</p> <p>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.</p> <p>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 Perelman-Carley.</p>			<p><i>Important: Please read before signing</i></p> <p>I understand that I may change or add beneficiaries at any time by completing and delivering the proper form to Perelman-Carley. Perelman-Carley had provided no tax or legal advice to me regarding my beneficiary designation.</p>			
Signature of Spouse		Date	IRA Holder		Date	
Signature of Witness		Date	Witness		Date	