

INHERITED IRA ELECTION

1. BENEFICIARY INFORMATION			
Legal Name: Jane Doe	Email: fake@email.com	Phone: XXX-XXX-XXXX	
Address: 123 Main St.	City: Anytown	State: CO	ZIP: 00000
Social Security Number: XXX-XX-XXXX	Date of Birth: (MM/DD/YYYY) 1/1/1960	Share: 100%	
RELATIONSHIP TO THE DECEASED			
<input checked="" type="radio"/> Spouse <input type="radio"/> Non-Spouse Individual <input type="radio"/> Non-Spouse Entity			
2. DECEDENT INFORMATION			
Account Holder Name: John Doe	New Direction Account Number: (If Applicable) 1000000	Social Security Number: XXX-XX-XXXX	
Date of Birth: (MM/DD/YYYY) 12/31/1960	Date of Death: (MM/DD/YYYY) 1/1/2020		
3. INHERITED ELECTION			
Please Note: If you have moved an existing Inherited IRA to New Direction Trust Company, attach a copy of the existing election, if possible, or inform us what election was made.			
<input type="radio"/> Ten-Year Rule: The end of the ten-year period is December 31, _____ (year)			
<input checked="" type="radio"/> Spouse: Treat this IRA as my Own (*This is available to Spouse Beneficiaries ONLY)			
4. SIGNATURE AND ACKNOWLEDGEMENT			
I certify that I am the Inherited IRA account holder or individual legally authorized to complete this form. I certify the accuracy of the information set forth in this form. I agree to provide the Custodian, New Direction Trust Company, with a copy of the original deceased IRA owner's or plan participant's death certificate and any other applicable documents, as requested. I understand that I am responsible for calculating any required minimum distribution and for any consequences based upon the election made above. I indemnify and agree to hold the custodian harmless from any resulting liabilities. I acknowledge that the Custodian cannot provide and has not provided me with tax or legal advice. I have been advised to seek the guidance of a tax or legal professional.			
Beneficiary Signature:		Date:	