

INHERITED IRA SETTLEMENT INFORMATION

NON-SPOUSE BENEFICIARY ELECTION OF PAYMENT

IRA CONTRACT INFORMATION: #: _____ Number of Beneficiaries: _____
 Annuitant (Deceased): _____ Date of Death: _____

Account Type: Traditional IRA, Roth IRA, Other _____ Current Value: \$ _____

IRA BENEFICIARY INFORMATION:

IRA Beneficiary (Primary) Name: _____ Social Security #: ____ - ____ - _____

Address: _____ City: _____ State: ____ Zip: _____

IRA BENEFICIARY SETTLEMENT OPTIONS – NON-SPOUSE (please Select one option)

Lump Sum: Please send lump sum payment of my portion of the death benefit.

Do you want federal tax withholding from your distribution? Yes, No

If yes, withhold _____ % of the total amount of your distribution; or please withhold \$ _____

Periodic withdrawals over a 10-year period: The account must be fully withdrawn by the end of the tenth (10th) year of the Annuitant/Owners death.

Fixed Period Annuity: _____ Number of years (cannot exceed 10-years)

Do you want federal tax withholding from your distribution? Yes, No

If yes, withhold _____ % of the total amount of your distribution; or please withhold \$ _____

Random Distribution over 10-years: _____ Number of years (cannot exceed 10-years)

Do you want federal tax withholding from your distribution? Yes, No

If yes, withhold _____ % of the total amount of your distribution; or please withhold \$ _____

10-Year Exemption Applies

Disabled Chronically Ill Minor Child (cannot be ten years younger than Deceased Annuitant)

 IRA Beneficiary Signature Date: _____

 President Signature Date: _____