FARM BUREAU BANK

IRA BENEFICIARY FORM

Use this form to add or remove a beneficiary to your Traditional IRA, Roth IRA, or Coverdell Education Savings Account. If you have more than one beneficiary, the percentage will be divided equally. If you would like an unequal percentage or would like more than two beneficiaries, please contact 1.800.492.3276.

Mail or fax this form using the address and fax number shown above, and be sure to keep a copy for your records.

Farm Bureau Bank
P.O. Box 33427
San Antonio, TX 78265-3427
Fax: 866.913.5087
Email: services@farmbureaubank.com

ACCOUNT INFORMATION

Account Number: ______________________ **Account Owner Name:** ______________________

Account Type: ☐ Traditional IRA ☐ Roth IRA ☐ Coverdell Education Savings Account (CESA)

BENEFICIARY INFORMATION

☐ Add Beneficiary ☐ Remove Beneficiary

Beneficiary/POD Name **Date of Birth** **SSN** **Relationship**

Physical Address

Physical Address City State Zip

☐ Add Beneficiary ☐ Remove Beneficiary

Beneficiary/POD Name **Date of Birth** **SSN** **Relationship**

Physical Address

Physical Address City State Zip

SPOUSAL CONSENT

Community or marital property state laws may require spousal consent for a nonspouse beneficiary designation. The laws of the state in which the financial organization is domiciled, the IRA owner resides, the trust is located, the spouse resides, or this transaction is consummated should be reviewed to determine if such a requirement exists. Spousal consent for the beneficiary designation may also be required by financial organization policy.

☐ **I am Married** - I understand that if I designate a primary beneficiary other than my spouse, my spouse must consent by signing below.

☐ **I am not Married** - I understand that if I marry in the future, I must complete a new Designation of Beneficiary Form which includes spousal consent documentation.

I am the spouse of the IRA owner. Because of the significant consequences associated with giving up my interest in the IRA, the custodian has not provided me with legal or tax advice, but has advised me to seek tax or legal advice. I acknowledge that I have received a fair and reasonable disclosure of the IRA owner's assets or property and any financial obligations for a community property state. In the event I have a legal interest in the IRA assets, I hereby give to the IRA owner such interest in the assets held in this IRA and consent to the beneficiary designation set forth in this Application.

Signature of Spouse **Date**

Signature of Witness *(if required)* **Date**

Witness cannot be a beneficiary of this IRA

SIGNATURES

Signature of IRA Owner **Date**

Signature of Custodian/Trustee **Date**