Wealth Management
U.S. Bancorp Investments

INSTRUCTIONS

Sec. 1

- Enter your name, Social Security number and U.S. Bancorp Investments, Inc. IRA account number.
- Enter your state of residence, marital status and check the type of IRA this designation is for.

Sec. 2

- Enter the full legal name of each beneficiary and that beneficiary's date of birth. Check "P" if this person is to be a Primary Beneficiary or "C" if Contingent Beneficiary. If the person listed is your spouse, check the "yes" box.
- You must enter a percentage of the account assets for each beneficiary. Be sure all shares for Primary Beneficiaries = 100% and all shares for Contingent Beneficiaries = 100%.

Sec. 3

- The community property/marital property subsection only needs to be signed when you are a married resident of one of the listed states and you did not name your spouse to receive at least 50% of your IRA account value.

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IRA BENEFICIARY DESIGNATION/ SPOUSAL CONSENT

020

1 Account Information

Primary Account Owner	SSN/TIN	Account #

State of Residence	☐ Married ☐ Single	Type of IRA ☐ Traditional IRA ☐ Traditional ABO IRA ☐ SEP IRA ☐ SIMPLE IRA ☐ Roth IRA ☐ Roth ABO IRA

Representative Name	Rep ID	Representative Phone *(10 digits)*

2 Designation of Beneficiary *(*Indicates all required fields.)*

I authorize U.S. Bancorp Investments, Inc. to revoke all previous beneficiary designations and replace with beneficiary designation on this page. Check "P" to indicate a Primary Beneficiary and "C" to indicate a Contingent Beneficiary.

BENEFICIARIES

	Type*	Full Legal Name*	Date of Birth*	SSN	Is this your spouse?	Share*	Rights of Representation
1	☐ P ☐ C				☐ Yes	______%	☐ Yes
2	☐ P ☐ C				☐ Yes	______%	☐ Yes
3	☐ P ☐ C				☐ Yes	______%	☐ Yes
4	☐ P ☐ C				☐ Yes	______%	☐ Yes
5	☐ P ☐ C				☐ Yes	______%	☐ Yes
6	☐ P ☐ C				☐ Yes	______%	☐ Yes
7	☐ P ☐ C				☐ Yes	______%	☐ Yes
8	☐ P ☐ C				☐ Yes	______%	☐ Yes
9	☐ P ☐ C				☐ Yes	______%	☐ Yes
10	☐ P ☐ C				☐ Yes	______%	☐ Yes

Community/Marital Property State *(Past or current residents of AZ, CA, ID, LA, NV, NM, TX, WA, WI, Puerto Rico and Guam.)*

If you are married and you currently reside (or have resided) in a community property or marital property state, your IRA Account may be subject to community property or marital property laws. If you do not designate your spouse as Primary Beneficiary for at least half of your IRA Account, your spouse must consent in writing to the beneficiary designation. See your lawyer or other tax professional for additional information and advice.

I certify that I am the spouse of the Applicant. I acknowledge that I have received a full and reasonable disclosure of my spouse's property and financial obligations. Due to any possible consequences of giving up my community/marital property interest in this IRA account, I have been advised to seek tax or legal advice prior to signing this consent. I hereby consent to the beneficiary designation for this IRA account.

______________________________ ______________

Signature of Account Holder's Spouse *(if applicable)* Date

3 Account Owner Signature

______________________________ ______________

Primary Account Owner Signature Date *(Not valid if not dated.)*