



Beneficiary IRA Account Amendment

US Mail	FOLIO <i>fn</i> Investments, Inc. 8180 Greensboro Dr. - 8 th Floor Mclean, VA 22102
Scan and Email, or Fax	This form must be mailed with a physical signature. It may not be faxed or scanned.

Questions? Call 1-800-973-7890

Beneficiary IRA Account Amendment

Step 1: Your Account Number

FOLIO*fn* Investments, Inc. Account Number: _____

Step 2: Account Holder Information

Name (first, middle initial, last)	Social Security Number
Home Street Address	City, State, ZIP
Mailing Address <input type="checkbox"/> Same as Home Address	City, State Zip

Step 3: Provide Original Account Holder Information (Decedent & Account)

Name (first, middle initial, last)	Social Security Number
Date of Birth	Date of Death
Original Account Holder (firm & account number if applicable)	Relationship to Beneficiary

Step 4: Sign and Date

I have read the **FOLIO*fn* Investments, Inc. IRA Plan Agreement and Disclosure** document, which is available on your website. I have read and understand the terms and conditions that apply to this IRA. I have opened the above referenced account with the intention of conversion to a Beneficiary IRA account.

I ACKNOWLEDGE THAT FOLIO*fn* INVESTMENTS, INC. DOES NOT PROVIDE INVESTMENT, TAX OR LEGAL ADVICE.

I understand and acknowledge that U.S. Bank N.A. is the custodian of record for my IRA.

Account Holder Signature X	Printed Name
Date	

Office Use Only

Approved By:	Date:
--------------	-------