

# IRA Beneficiary Designation Form

### Instructions:

Complete all applicable sections of this form to designate a beneficiary to your SEI Individual Retirement Account. In order for a beneficiary request to be considered complete, **all 4 pages** must be submitted. Altered forms will not be accepted.

Forward completed **original form** to address below. Faxed forms **will not** be accepted.

SEI Private Trust Company  
Attention: Advisor Network (Service Team)  
P.O. Box 1098  
Oaks, PA 19456-9907

### 1 Investor Information

\_\_\_\_\_  
IRA Holder's Name

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Date of Birth

### 2 Advisor Information

\_\_\_\_\_  
Advisor's Name

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Fax Number

### 3 Type of Request

- Initial Designation(s), **OR**
- Replace Existing Beneficiary Designation(s)  
(Restate **all** Beneficiary designations)

### 4 IRA Information

- Roth IRA       Traditional IRA
- SEP-IRA       Inherited IRA

### 5 Beneficiary Designation Choices

SEI Private Trust Company is willing to accept *Per Stirpes*, *Per Capita* and *All My Children* Beneficiary designations. The following is a brief description of these designations. Please be advised that SEI Private Trust Company offers no advice or direction through the offering of this form as it is intended to capture your Beneficiary request only and suggests that the IRA owner completing this form seek the advice of your Registered Investment Advisor (RIA), or an estate planning professional. SEI Private Trust Company **will not** be responsible for locating or contacting Beneficiaries, or their issue.

**Standard Designation** means that upon your death, the assets held within your IRA will be distributed to your selected beneficiary(ies). In the event that said beneficiary(ies) predecease(s) you, the beneficiary(ies)'s percentage will be divided, on a pro-rata basis, among the remaining primary beneficiary(ies), if any, or if there are no surviving primary beneficiaries, among the contingent beneficiary(ies) on this form.

**Per Stirpes** means that upon your death, the assets held within your SEI IRA will be distributed to your selected Beneficiary(ies) as normal, but in the event that said Beneficiary(ies) predeceases the account owner, his or her percentage is passed on, equally, to his issue. If he or she has no surviving issue, the funds will be divided among the remaining Beneficiaries on a pro-rata basis. Per Stirpes and Per Capita **MAY NOT** be used within the same level of designation (i.e. one primary beneficiary Per Capita, one Per Stirpes).

**Per Capita** means that upon your death, the assets held within your SEI IRA will be distributed to your selected Beneficiary(ies) as normal, but in the event that said Beneficiary(ies) predeceases the account owner, his or her share is divided equally among both his or her issue, as Primary Beneficiary(ies), and the remaining Primary Beneficiary(ies) named by you. If he or she has no surviving issue, the funds will be divided among the remaining Beneficiaries on a pro-rata basis. Per Stirpes and Per Capita **MAY NOT** be used within the same level of designation (i.e. one primary beneficiary Per Capita, one Per Stirpes).

**All My Children** means that upon your death, the assets held within your SEI IRA will be distributed to your surviving natural or adoptive children. Step-Children are not eligible with this designation. SEI cannot honor any exclusions when using the 'All My Children' designation. Should there be no living children at the time of the IRA Holder's death the assets will pass to the Contingent Beneficiaries, if named, or to the estate if there are no Contingent Beneficiaries. It is not necessary to list the names of each individual child.

**Primary Beneficiary Designation(s)**

Upon the death of the IRA owner, SEI Private Trust Company will transfer ownership of the account, in the percentages specified, to the Beneficiary(ies) listed below once proper notification of death has been received and proof of inheritance tax payment (if applicable) has been provided. The election made below supercedes any previous election and is not valid unless signed by the IRA owner. Beneficiary percentages must equal 100% or the form will be rejected. If additional space is required, please restate all Beneficiaries on a separate signed page. **Per Stirpes and Per Capita MAY NOT be used within the same level of designation (i.e. one primary beneficiary Per Capita, one Per Stirpes).**

Primary Beneficiary Designation(s):

1.	Beneficiary Name (First, Last)	Designation Choice (e.g., Standard, Per Stirpes, etc.)	_____ % Share
	Relationship	Social Security <b>OR</b> Federal Tax ID Number	Date of Birth
2.	Beneficiary Name (First, Last)	Designation Choice (e.g., Standard, Per Stirpes, etc.)	_____ % Share
	Relationship	Social Security <b>OR</b> Federal Tax ID Number	Date of Birth
3.	Beneficiary Name (First, Last)	Designation Choice (e.g., Standard, Per Stirpes, etc.)	_____ % Share
	Relationship	Social Security <b>OR</b> Federal Tax ID Number	Date of Birth
4.	Beneficiary Name (First, Last)	Designation Choice (e.g., Standard, Per Stirpes, etc.)	_____ % Share
	Relationship	Social Security <b>OR</b> Federal Tax ID Number	Date of Birth
5.	Beneficiary Name (First, Last)	Designation Choice (e.g., Standard, Per Stirpes, etc.)	_____ % Share
	Relationship	Social Security <b>OR</b> Federal Tax ID Number	Date of Birth

**Note:** If more space is required, restate **all Beneficiaries** on a separate signed page. All separate pages will be reviewed by SEI Private Trust Company and may or may not be accepted as submitted. In the event the designations on the separate page(s) is/are not acceptable, an SEI Private Trust Company service representative will contact your Advisor to review the revisions necessary for acceptance by SEI Private Trust Company.

\_\_\_\_\_ %  
Total Share  
(Must equal 100%)

SEI Account Number: \_\_\_\_\_

**6 Contingent Beneficiary Information**

SEI Private Trust Company will transfer ownership of your investment account to the Contingent Beneficiary(ies) listed below in the event the Primary Beneficiary(ies) predeceases the shareowner and the Contingent Beneficiary(ies). If there are no surviving Contingent Beneficiaries at the time of your death, then SEI Private Trust Company will transfer ownership of your account to your estate. If additional space is required, please restate **all Beneficiaries** on a separate signed page.

Contingent Beneficiary Designation(s):

1. \_\_\_\_\_ %  
Beneficiary Name (First, Last) Designation Choice (e.g., Standard, Per Stirpes, etc.) Share

Relationship Social Security OR Federal Tax ID Number Date of Birth

2. \_\_\_\_\_ %  
Beneficiary Name (First, Last) Designation Choice (e.g., Standard, Per Stirpes, etc.) Share

Relationship Social Security OR Federal Tax ID Number Date of Birth

3. \_\_\_\_\_ %  
Beneficiary Name (First, Last) Designation Choice (e.g., Standard, Per Stirpes, etc.) Share

Relationship Social Security OR Federal Tax ID Number Date of Birth

4. \_\_\_\_\_ %  
Beneficiary Name (First, Last) Designation Choice (e.g., Standard, Per Stirpes, etc.) Share

Relationship Social Security OR Federal Tax ID Number Date of Birth

5. \_\_\_\_\_ %  
Beneficiary Name (First, Last) Designation Choice (e.g., Standard, Per Stirpes, etc.) Share

Relationship Social Security OR Federal Tax ID Number Date of Birth

**Note:** If more space is required, restate **all Beneficiaries** on a separate signed page. All separate pages will be reviewed by SEI Private Trust Company and may or may not be accepted as submitted. In the event the designations on the separate page(s) is/are not acceptable, an SEI Private Trust Company service representative will contact your Advisor to review the revisions necessary for acceptance by SEI Private Trust Company.

\_\_\_\_\_  
Total Share %  
(Must equal 100%)

