

Contact Center: (800) 248-8447 | www.ForgeTrust.com

You must complete and submit this form with the Account Application form if you are establishing an inherited or beneficiary IRA.

1. PERSONAL INFORMATION (*required field)

Should Forge Trust Co. need to contact you in regards to this request, your preferred method of contact is:

Email

Primary Phone

First Name*	Middle Name	Last Name*
Account Number	Social Security Number* (last 4 digits)	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email (Your personal email only)	

2. INHERITED/BENEFICIARY ACCOUNT INFORMATION (*required field)

I am transferring/rolling over a beneficiary account where I am the beneficiary. I declare that the following information are the true facts and elections made at the time the account was distributed to me as beneficiary:

¹ Only allowed if grantor was not in distribution at the time of death

² Begun by the later of 12/31 of the year following the grantor's death or the year grantor would have been 73

³ If Grantor was in distribution at the time of death and was younger than beneficiary, then this option is required if single life expectancy payments option is chosen

⁴ Begun by 12/31 of the year following the grantor's death

⁵ Assumes separate accounting applies, otherwise oldest beneficiary's age must be used, please contact Forge Trust Co. if separate accounting not used

⁶ Required if Grantor passed away on or after 01/01/2020.

Grantor (Decedent) Information*

Name of Decedent	Account distribution status at the time of death (select one):	
Date of Birth (MM/DD/YYYY)	Date of Death (MM/DD/YYYY)	in distribution
		not in distribution

Beneficiary Type*

I am a (select one) ...	Select election for beneficiary type:
Spousal Beneficiary	Treated as my own IRA Elect 5-year rule payout ¹ Single life expectancy payments based on my (spouse's) age ² Single life expectancy payment based on grantor's age ^{3,4}
Non-Spousal Beneficiary See Through Trust	Elect 5-year rule payout ¹ Single life expectancy payments based on my (beneficiary) age not recalculated ⁵ Single life expectancy payment based on grantor's age not recalculated ^{3,4} Mandated 10-year distribution ⁶ Last Life Expectancy Factor Used: _____
Non-Person Beneficiary	5-year rule required if grantor was not in distribution at the time of death Single life expectancy payments based on grantor's age not recalculated ⁴ Mandated 10-year distribution ⁶ Last Life Expectancy Factor Used: _____

3. SIGNATURE

Participant Signature X	Date (MM/DD/YYYY)
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Please sign and submit additional documents as required.

DELIVERY INSTRUCTIONS

Email
newaccounts@ForgeTrust.com

Fax
(650) 745-2902

Regular mail
Forge Trust Co.
PO Box 2048
San Francisco, CA 94126

Overnight mail
Forge Trust Co.
4 Embarcadero Ctr, Floor 15
San Francisco, CA 94111