

# IRA Designation of Beneficiary



Complete this form to establish or change the beneficiary designation on your Wells Fargo Funds traditional IRA, Roth IRA, SIMPLE IRA, or SEP-IRA. If you have questions, call 1-800-222-8222.

**Overnight address:** Wells Fargo Funds, c/o DST Asset Manager Solutions, 430 W. 7th Street, STE 219967, Kansas City, MO 64105

P.O. Box 219967 | Kansas City, MO 64121  
wellsfargofunds.com

## 1 REGISTRATION AND MAILING ADDRESS (PLEASE PRINT)

_____ Name of account owner (first, middle initial, last)	_____ Social Security number	_____ Date of birth (mm/dd/yyyy)	
_____ U.S. residential street address	_____ City	_____ State	_____ ZIP code
_____ U.S. mailing address (if different than U.S. residential street address)	_____ City	_____ State	_____ ZIP code
_____ Daytime phone	_____ Evening phone		

**Note:** If the address above is different than the address currently listed on our records, we will update all accounts under the Social Security number to reflect this new address. All future correspondence will be sent to the new address until you advise us otherwise. Distributions to a new address will require your signature to be Medallion Guaranteed if requested within 15 days of the address change.

## 2 ACCOUNTS

Choose one:

- Update the beneficiary designation on all of my Wells Fargo Funds individual retirement accounts.
- Make this change only on the specific accounts listed below.

_____ Fund and account number	_____ Fund and account number
_____ Fund and account number	_____ Fund and account number

## 3 PRIMARY BENEFICIARY(IES)

**Primary beneficiary(ies):**  
Individual(s) or entity(ies) who will receive the funds upon the death of the IRA owner.  
  
To name additional primary beneficiaries, include all information in this section on a separate sheet.

Beneficiary(ies) must be designated by name, and the sum of the percentages for all primary beneficiaries must equal 100%. Unless noted, we will assume equal distribution among primary beneficiaries. To establish designations of lineal descendants or lineal descendants per stirpes, print the designation next to the name of each primary beneficiary (consult with your estate planning attorney before indicating this option).

_____ Name of beneficiary (first, middle initial, last) or entity	_____ Name of beneficiary (first, middle initial, last) or entity
_____ Mailing address	_____ Mailing address
_____ City	_____ City
_____ State	_____ State
_____ ZIP code	_____ ZIP code
_____ Beneficiary's Social Security/taxpayer ID number	_____ Beneficiary's Social Security/taxpayer ID number
_____ Date of birth (mm/dd/yyyy)	_____ Date of birth (mm/dd/yyyy)
_____ Relationship	_____ Relationship
_____ Percentage %	_____ Percentage %

**Spousal consent:** For use by the IRA owner who resides in or establishes an IRA in a community or marital property state, including, but not limited to, Alaska, Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, or Wisconsin, and names a beneficiary other than his or her spouse.

It is your responsibility to determine whether spousal consent is necessary. Failure to have your spouse sign below may invalidate your beneficiary designation for a portion of your IRA. Please consult your tax or legal advisor if you have questions about this section.

I am the spouse of the IRA owner named above. I understand that my spouse is naming a primary beneficiary for the IRA other than myself. I approve of and consent to the naming of said beneficiary, and I hereby transmute (transfer) and partition any community or marital property interest I have, or would otherwise acquire, in this IRA into the separate property of my spouse for disposition consistent with this designation.

**X** \_\_\_\_\_  
Signature of spouse

\_\_\_\_\_  
Print name

\_\_\_\_\_  
Date

#### 4 SECONDARY BENEFICIARY(IES)

**Secondary beneficiary(ies):** Individual(s) or entity(ies) who will receive the funds upon the death of the IRA owner if all primary beneficiaries predeceased the IRA owner. To name additional secondary beneficiaries, include all information in this section on a separate sheet.

Beneficiary(ies) must be designated by name, and the sum of the percentages for all secondary beneficiaries must equal 100%. Unless noted, we will assume equal distribution among secondary beneficiaries. To establish designations of lineal descendants or lineal descendants per stirpes, print the designation next to the name of each secondary beneficiary (consult with your estate planning attorney before indicating this option).

Name of beneficiary (first, middle initial, last) or entity			Name of beneficiary (first, middle initial, last) or entity		
Mailing address			Mailing address		
City	State	ZIP code	City	State	ZIP code
Beneficiary's Social Security/taxpayer ID number			Beneficiary's Social Security/taxpayer ID number		
Date of birth (mm/dd/yyyy)	Relationship	Percentage %	Date of birth (mm/dd/yyyy)	Relationship	Percentage %

#### 5 SIGNATURE

I understand that this beneficiary designation shall replace any previous beneficiary designation(s) I have made for the applicable Wells Fargo Funds accounts as requested in section 2 of this form. I acknowledge that this designation is effective upon receipt in good order by the fund's transfer agent and will remain in effect until I deliver written notice of a change or revocation of beneficiary(ies) to the fund's transfer agent.

To complete this form, you must sign and date here.

 \_\_\_\_\_  
Signature of account owner \_\_\_\_\_  
Date

#### 6 DESIGNATION OF BENEFICIARY(IES)

- Beneficiary designations will apply only to the account(s) as designated in section 2 of this form and any new accounts established by subsequent exchange from one of the designated accounts.
- You can change your beneficiaries at any time by submitting a new IRA Designation of Beneficiary form.
- In the event that a named primary beneficiary predeceases the account owner, the deceased beneficiary's designated portion of the account will be allocated among the surviving primary beneficiaries on a pro rata basis, except for designations of lineal descendants or lineal descendants per stirpes. If there are no remaining primary beneficiaries, then the assets will be allocated among the designated secondary beneficiaries.
- In the event that the IRA owner has not designated a beneficiary, or if all beneficiaries predecease the IRA owner, the IRA assets shall be distributed per the IRA Custodial Agreement and Disclosure Statement in effect at the time of death.
- In the event of divorce and a former spouse is a designated beneficiary, the former spouse will be treated as having predeceased the IRA owner, unless the designation was made after the divorce or a court order provides otherwise.
- Beneficiaries cannot be named on a minor IRA.
- A minor may be named as a beneficiary. In the event that the IRA owner dies while the beneficiary is still a minor, a parent or guardian must maintain control of the account until the beneficiary reaches legal age.
- A non-U.S. citizen or nonresident alien may be named as a beneficiary. Beneficiary distributions may be subject to withholding at the applicable treaty rate.
- Changing your primary beneficiary after you have reached the age of 70½ may alter the amount of your required minimum distribution (RMD). It is your responsibility to contact us to make any necessary changes to your RMD calculation.