

IRA Form Instructions

IRA Simplifier

Complete only the following information below:

- 1) IRA Holder's Name and Address
- 2) IRA Holder's Social Security Number
- 3) IRA Holder's Home Phone
- 4) IRA Holder's Business Phone
- 5) IRA Holder's Date of Birth
- 6) IRA Holder's E-mail Address
- 7) Contribution for Tax Year
- 8) Traditional IRA Contribution Type (only select Regular or Transfer)
- 9) Beneficiary's Name and Address
- 10) Beneficiary's Date of Birth
- 11) Beneficiary's Social Security Number
- 12) Beneficiary's Relationship to IRA Holder: Spouse or Non-spouse
- 13) Primary or Contingent
- 14) Beneficiary's Share % (must equal 100%)
- 15) Current Marital Status (only if IRA Holder resides in a community or marital property state: AZ, AK, CA, ID, LA, NM, NV, TX, WA, and WI)
- 16) Consent of Spouse signature and date (only if IRA Holder resides in a community or marital property state) (witness signature not required)
- 17) Signature and Date of IRA Holder (witness signature not required)