PO Box A3535
Chicago, IL 60690

Phone: 888-795-7950
www.IRAclub.org

Inherited IRA Account

This form provides the information to process and establish an inherited IRA with The IRA Club.

Decedent Information

First Name: ______________________ MI: _____ Last: _________________________

Social Security Number: ________________ Date of Birth: ________________________

Date of Death: ___________________

Was the account owner taking required minimum distributions?

◯ YES ◯ NO ◯ NOT SURE

Type of Beneficiary

◯ Spouse Beneficiary ◯ Non-Spouse ◯ Non- Person (i.e. Trust)

Tax Type

◯ Traditional, SEP-IRA or SIMPLE IRA ◯ ROTH IRA

Documents Checklist

In addition to this form, please submit the following documents to establish the inherited IRA account.

- ☐ Certified Copy of the IRA owner's death certificate
- ☐ Completed IRA Application Packet
- ☐ Completed IRA Transfer form if the account is being transferred to The IRA Club from another IRA company
- ☐ Copy of account statement to verify the type of IRA if transferring from another company

Applicant Name: __________________________ Phone Number: ________________

Signature: ___________________________________ Date: ___________________

Email	Fax
newaccounts@iraclub.org	800-600-6997