



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
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Applicant Name: _____ Phone Number: _____

Signature: _____ Date: _____

Email	Fax
newaccounts@iraclub.org	312-283-2615