



IRA Beneficiary Disbursement Election

As a beneficiary of an IRA held by a deceased BECU member, you must complete this form and select a disbursement option below.

- BECU will provide you with information about next steps once we have processed this form.
- IRA beneficiary disbursements have tax implications. We recommend consulting a tax advisor.

Step 1. Decedent information

Decedent Name	Decedent SSN / TIN (9 digits)
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Step 2. Beneficiary information

Legal Name		Date of Birth	
SSN / TIN (9 digits)	Mother's Maiden Name	Phone	
Street Address			
City	State / Province	ZIP / Postal Code	Country
Mailing Address (if different than above)			
City	State / Province	ZIP / Postal Code	Country

Step 3. Select a disbursement option

- Death distribution of my portion of the funds
- Direct transfer to my BECU IRA as the surviving spouse
- Direct transfer to my IRA at another financial institution as the surviving spouse
- Direct transfer to my inherited IRA at another financial institution

Step 4. Acknowledgment and consent

I have consulted a tax advisor and/or I fully understand the tax implications arising from any IRA death distribution or direct transfer. I will not hold BECU responsible for any taxes, fees, or fines associated with this requested disbursement. I certify (or declare) under penalty of perjury under the laws of the state of Washington that the statements made in this attestation are true and correct, and it is executed at the place and on the date indicated below.

Signature	Printed Name
Today's Date (mm/dd/yyyy)	Place

If form is not submitted electronically, please return completed and signed form to:

BECU
M/S: Account Servicing 1094-2
PO Box 97050
Seattle, WA 98124-9750