Spouse Beneficiary's Premiere Select IRA Account Number

Premiere Select® IRA Transfer Request Form for Spouse Beneficiary

This form should be used to request a transfer of an inherited Premiere Select Traditional IRA, Roth IRA, Rollover IRA, SEP-IRA, or SIMPLE IRA ("Premiere Select IRA") to your Premiere Select IRA. You must be a spouse beneficiary in order to transfer inherited IRA assets to your IRA. You must include a certified copy of the IRA owner's death certificate and send it with this completed form to your investment representative.

Notes:

- If you are transferring more than one Premiere Select IRA, you must complete a separate form for each IRA you are transferring.
- To establish a Premiere Select IRA, you must complete a Premiere Select IRA Application which can be obtained from your investment representative.
- If the decedent died after his or her required beginning date, you must satisfy the decedent's required minimum distribution for the year of death if the decedent had not done so prior to death.

1 Decedent's IRA Information

Decedent's First Name ______ MI ___ Last Name ______

Decedent's Premiere Select IRA Account # ___-______ Date of Birth __-__-____

Social Security Number ___-__-____ Date of Death __-__-____

2 Spouse Beneficiary's Information

First Name ______ MI ___ Last Name ______

Social Security Number ___-__-____ Date of Birth __-__-____

3 IRA Transfer Instructions

Cash and/or shares/units to which you are entitled as the spouse beneficiary will be transferred into your Premiere Select IRA specified above.

☐ **A. Transfer all of the assets to which I am entitled to my Premiere Select IRA OR**

☐ **B. Transfer a portion of the assets to which I am entitled to my Premiere Select IRA** ___ **%**

OR $ _______.__ **OR** ☐ all assets EXCEPT Investment Name ______ CUSIP/Symbol ______

All assets, to which you are entitled, that are not transferred must be transferred to an IRA Beneficiary Distribution Account (IRA-BDA) established on your behalf. To establish an IRA-BDA and transfer any remaining assets, you must complete a Premiere Select IRA Application which can be obtained from your investment representative.

Note: For Roth IRAs, if you are the beneficiary of a Roth IRA and you, as the surviving spouse, have your own Roth IRA, the 5-Year Aging Period ends at the earlier of the end of the 5-Year Aging Period of the decedent's Roth IRA or the end of the 5-Year Aging Period for your own Roth IRA. If you do not have your own Roth IRA, you inherit the decedent's 5-Year Aging Period.

4 Signature **Please check to make sure you have completed all appropriate sections of this form, then sign and date below.**

I hereby certify that the information supplied on this form is complete and accurate. I also certify that (i) I understand the distribution choices applicable to me (or, if I am acting on behalf of a beneficiary, the beneficiary for whom this distribution is directed) and (ii) I have elected a distribution option consistent with my status (or the beneficiary's status on whose behalf I am acting) as a spouse beneficiary. I hereby direct Fidelity Management Trust Company, Custodian of the IRA (or its successor, agents, affiliates or assigns), to transfer, as set forth above, the IRA assets of which I am (or the beneficiary on whose behalf I am acting) a spouse beneficiary to my Premiere Select IRA specified above. I accept full responsibility for complying with IRS rules including Required Minimum Distributions due to death and I hereby indemnify the Custodian of the Premiere Select IRA and National Financial Services LLC and their agents, successors, affiliates and employees from any and all liability in the event that I fail to meet any applicable IRS requirements with respect to this transfer.

I hereby certify under penalties of perjury that if I am a U.S. person (including a U.S. resident alien) the number shown in Section 1 of this form is my correct Social Security number. If I am not a U.S. person (including a U.S. resident alien), I have attached IRS Form W-8BEN with this Premiere Select IRA Transfer Request Form for Spouse Beneficiary and included my U.S. Social Security number in order to claim tax treaty benefits, if applicable.

IRA Spouse Beneficiary/Authorized Signator Signature ______ Date (required) ______