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 and the sole 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 minimum required distribution for the year of death if the decedent had not done so prior to death.

1 Spouse Beneficiary's Information

First Name MI Last Name

Social Security Number Date of Birth

2 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

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 $.

Please provide a percentage or dollar amount of the assets to be transferred to your IRA specified above.

To the extent that you do not direct the transfer of all assets to your IRA, the remaining assets 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-BDA Application which can be obtained from your investment representative.

Note: For Roth IRAs, if you are the sole 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.**

Your signature must be guaranteed for a transfer amount of $100,000 or more. Please see below for a definition of eligible Signature Guarantors.

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 and the sole beneficiary to my Premiere Select IRA specified above. I accept full responsibility for complying with IRS rules including Minimum Required 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)

Signature Guarantee Stamp

A signature guarantee may be executed by any "eligible guarantor." Eligible guarantors include Commercial Banks, Trust Companies, Savings Associations and Credit Unions as defined by the Federal Deposit Insurance Act. Also included are member firms of a domestic stock exchange. You should verify with the institution that they are an acceptable (eligible) guarantor prior to signing. A guarantee from a Notary Public is not acceptable.