Morton Clarke Burns Fu & Metcalf

Social Security Number *(required)*

Account Number

Premiere Select℠

IRA Beneficiary Designation Form

Please complete all sections of this form to designate a beneficiary or to change a beneficiary for your Premiere Select Traditional IRA, Roth IRA, Rollover IRA, SEP-IRA or SIMPLE IRA ("Premiere Select IRA"). If you are changing a beneficiary designation, the information you provide on this form will replace any previous designations you may have made for the IRA specified herein. Leaving the contingent beneficiary designation section blank constitutes an update and will result in the removal of any contingent beneficiary information you may have on file. If you have more than one Premiere Select IRA, you must complete a separate form for each IRA.

❶ Account Information

Owner's First Name MI Last Name

(Please choose IRA type) ☐ **Traditional IRA** ☐ **Roth IRA** ☐ **Rollover IRA** ☐ **SEP-IRA** ☐ **SIMPLE IRA**

❷ Beneficiary Designation

I hereby designate the person(s) named below as primary beneficiary(ies) to receive payment of the value of my Premiere Select IRA specified above upon my death.

Note: (1) If you wish to designate your estate as your beneficiary, please indicate "Estate" in the Primary Beneficiary section.

(2) If your account contains community property and you do not designate your spouse as your primary beneficiary for at least 50% of the value of your account, you may want to consult with your attorney or tax advisor to determine the impact of community property laws on your beneficiary designation.

PRIMARY BENEFICIARIES

1. Name of Beneficiary/Trust Social Security Number or Tax ID Number

Name of Trustee (if applicable) Relationship Share %* Date of Birth

Address Trust Date

2. Name of Beneficiary/Trust Social Security Number or Tax ID Number

Name of Trustee (if applicable) Relationship Share %* Date of Birth

Address Trust Date

3. Name of Beneficiary/Trust Social Security Number or Tax ID Number

Name of Trustee (if applicable) Relationship Share %* Date of Birth

Address Trust Date

***Please Note:** Total of primary beneficiary's(ies') share percentages must equal 100%. Do not use fractional percentages or dollar amounts.

Please complete and sign the next page

Premiere Select℠

Account Number

IRA Beneficiary Designation Form

If more than one person is named and no share percentages are indicated, payment shall be made to my primary beneficiary(ies) who survive me in equal shares. If a percentage is indicated and a primary beneficiary(ies) does not survive me, the percentage of that beneficiary(ies) designated share shall be divided equally among the surviving primary beneficiary(ies). If there is no primary beneficiary living at the time of my death I hereby specify that the balance is to be distributed to my contingent beneficiary(ies) listed below.

CONTINGENT BENEFICIARIES

1. Name of Beneficiary/Trust

Social Security Number or Tax ID Number

Name of Trustee (if applicable)

Relationship

Share %*

Date of Birth

Address

Trust Date

2. Name of Beneficiary/Trust

Social Security Number or Tax ID Number

Name of Trustee (if applicable)

Relationship

Share %*

Date of Birth

Address

Trust Date

3. Name of Beneficiary/Trust

Social Security Number or Tax ID Number

Name of Trustee (if applicable)

Relationship

Share %*

Date of Birth

Address

Trust Date

***Please Note:** Total of contingent beneficiary's(ies') share percentages must equal 100%. Do not use fractional percentages or dollar amounts. Payment to contingent beneficiaries will be made according to the rules of succession described under the Primary Beneficiaries section.

If I have elected to convert a Traditional IRA, Rollover IRA, SEP-IRA, or SIMPLE IRA, other than a Premiere Select (NFS) IRA, to a Premiere Select Roth IRA, I designate the persons named above as primary or contingent beneficiary(ies) to receive the value of the Premiere Select IRA established to facilitate the conversion and the Premiere Select Roth IRA. I understand that payment to any beneficiary(ies) of my Premiere Select IRA established to facilitate a conversion will be made according to the rules of succession as described above.

Please Note: Any attachments for additional beneficiaries must include your account number and your signature.

❸ Signature

I understand that if I have not previously designated any beneficiary(ies) and choose not to designate any beneficiary(ies), the beneficiary of the above referenced Premiere Select IRA will be my surviving spouse, or, if I do not have a surviving spouse, my estate. I am aware that this designation becomes effective when received and accepted by National Financial Services LLC and will remain in effect until National Financial Services LLC receives and accepts another designation with a later date.

I understand the beneficiary information provided herein shall apply to the Premiere Select IRA indicated above for which Fidelity Management Trust Company (or its affiliates and/or successor custodian appointed pursuant to the terms of such IRA) acts as Custodian and shall replace all previous designation(s) I have made for the Premiere Select IRA indicated above.

Signature of IRA Owner

Date

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