

Investment Advisor ("IA") Information (This portion to be completed by IA.)	
IA Firm Name (please print): <u>BEACON INVESTMENT MANAGEMENT</u>	
IA Master Account Number: <u>8485367</u>	Service Team: <u>IST 3</u>

This form may be used to designate one or more beneficiaries for an IRA, 403(b)(7) account or Education Savings Account. To designate beneficiaries for a Qualified Retirement Plan (QRP), use the QRP Designation of Beneficiary(ies) form.

**1. Account Holder Information**

First Name	Middle	Last
Schwab Account Number	Social Security/Tax ID Number	

**2. Designate Your Beneficiary(ies)**

- If this is an IRA (except for a Custodial IRA for a minor) and I live in a state with community property statutes and do not designate my spouse as the sole Primary Beneficiary, I represent and warrant that my spouse has consented to such designation.
- If this is a Custodial IRA for a minor, I understand that only the minor's estate can be the beneficiary until such time as the minor becomes the owner of the IRA and designates his or her own beneficiaries.
- If this is an Education Savings Account, the beneficiary must be a qualified member of the current designated beneficiary's (account holder's) family. A qualified family member is defined as the spouse of the designated beneficiary and any child, grandchild, stepchild, sibling, parent, grandparent, stepparent, niece or nephew, aunt or uncle, son-in-law, daughter-in-law, father-in-law, mother-in-law, brother-in-law, or sister-in-law and the spouse of any such individual as well as the first cousins (but not their spouses).
- If you wish to designate more than four primary or contingent beneficiaries, attach a separate sheet of paper. Provide all the information above, including percentage of IRA for each beneficiary. (Percentages must total 100%.)
- If more than one beneficiary is designated, the percentages must total 100%.
- I understand that if I fail to indicate percentage of benefits, Schwab will divide benefits equally among the beneficiaries I designate. **Note:** Benefits cannot be expressed in dollar amounts.
- If you designate a trust as a beneficiary, you must also provide the date of the trust.

**Primary Beneficiary(ies):** I designate the following person(s) or entity(ies) below as primary beneficiary(ies) to receive payment of the value of my account upon my death.

Share %	Trust Name (if applicable)	Trust Date (mm/dd/yyyy)	Share %	Trust Name (if applicable)	Trust Date (mm/dd/yyyy)
	Name			Name	
	Social Security/Tax ID Number			Social Security/Tax ID Number	
	Relationship	Birthdate (mm/dd/yyyy)		Relationship	Birthdate (mm/dd/yyyy)
Share %	Trust Name (if applicable)	Trust Date (mm/dd/yyyy)	Share %	Trust Name (if applicable)	Trust Date (mm/dd/yyyy)
	Name			Name	
	Social Security/Tax ID Number			Social Security/Tax ID Number	
	Relationship	Birthdate (mm/dd/yyyy)		Relationship	Birthdate (mm/dd/yyyy)

<b>For Charles Schwab Use Only</b>	
Account Number	Date Approved (mm/dd/yyyy)
Print Name of Approver	Signature



