Phone: (602) 899-9396
www.directedira.com

Spousal Consent – Addendum to Beneficiary Designation

The Spousal Consent Form is an Addendum to the Beneficiary Designation Form on file. The Spousal Consent signature must be signed in front of a Notary Public. A legible copy must be returned to Directed Trust Company via email or fax. The Account Owner should retain the original for their records. If the Account Owner resides in a community property state a Spousal Consent form is required (AZ, CA, ID, LA, NV, NM, TX, WA, WI). If you have any questions, please consult your attorney or financial advisor.

1. Account Owner Information

First Name: _____ MI: _____ Last Name: _____

Last 4 of SSN: _____ Date of Birth: _____/_____/_____ Phone Number: _____

Directed IRA Account Number: _____ Account Type: _____

2. Spousal Consent

If Box A ii. Is checked on the Beneficiary Designation Form or Beneficiary Designation section within the account application, designating someone other than the Account Owner's spouse as the sole primary beneficiary, this section MUST be NOTARIZED by the Spouse of the Account Owner. Complete this section only if the IRA Owners legal residence is in a community property state and you wish to name a beneficiary other than or in addition to your spouse as the sole primary beneficiary.

By signing below, I acknowledge that I am the spouse of the IRA Account Owner and agree with and consent to my spouse's designation of a primary beneficiary other than, or in addition to, me. I have been advised to consult legal counsel or a financial advisor and I assume all responsibility regarding this consent. The Custodian has not provided me any legal or tax advice.

➢ _____ _____ _____

Spouse's Signature | Spouse's Printed Name | Date

STATE OF _____)

COUNTY OF _____)

Subscribed and sworn before me this _____ day of _____, 20_____.I, _____, a notary public, do hereby certify that _____ did personally appear before me and did acknowledge that he/she signed this Spousal Consent by his/her free act and deed.

_____

Notary Public Signature

My Commission Expires: _____

3. Account Owner Signature (Notary Signature NOT required)

I have completed, understand and agree to all pages of the Beneficiary Designation form, including this Spousal Consent form. I understand that this Spousal Consent Form is an Addendum to the current Beneficiary Designation on file. This designation supersedes all prior designations. In addition, I assume all responsibilities for the elections I have made, including those related to naming a non-spouse beneficiary, if I am married. I will indemnify and hold the Custodian harmless form any consequences related to executing my directions. I have been advised to seek competent legal or tax advice and have not been provided any such advice from the Custodian.

➢ _____ _____

Participant's Signature | Date

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