

## **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 MI: Last Name: \_\_\_\_\_ First Name: Last 4 of SSN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Phone Number: \_\_\_\_\_ Directed IRA Account Number: 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 Account 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 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 \_\_\_\_\_\_ \_ day of Subscribed and sworn before me this \_\_\_\_\_, a notary public, do hereby certify that \_\_\_ 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 nonspouse 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

Directed IRA is a tradename of Directed Trust Company, an Arizona Corporation

INVESTMENTS: NOT FDIC INSURED • NO GUARANTEE • MAY LOSE VALUE

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