Roth IRA Application

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Community or marital property state laws may require spousal consent for a nonspouse beneficiary designation. The laws of the state in we the financial organization is domicited, the Roth IRA owner resides, the trust is located, the spouse resides, or this transaction is consuming should be reviewed to determine if such a requirement exists. Spousal consent for the beneficiary designation may also be required by finan organization policy. I Am Married. I understand that if I designate a primary beneficiary other than my spouse, my spouse must consent signing below. I Am Not Married. I understand that if I marry in the future, I must complete a new Designation of Beneficiary for which includes the spousal consent documentation. I am the spouse of the Roth IRA owner. Because of the significant consequences associated with giving up my interest in the Roth IRA custodian/frustee has not provided me with legal or tax advice, but has advised me to seek tax or legal advice. I acknowledge that I received a fair and reasonable disclosure of the Roth IRA owner's assets or property and any financial obligations for a community progratate. In the event I have a legal interest in the Roth IRA assets. I hereby give to the Roth IRA owner such interest in the assets held in Roth IRA and consent to the beneficiary designation set forth in this Application. Signature of Spouse Date Signature of Witness (if required) Witness cannot be a beneficiary of this Roth IRA) Date SIGNATURES I certify that the information provided by me on this Application is accurate, and that I have received a copy of IRS Form 5305-R, Individual Retirement Trust Account or IRS Form 5305-R, Roth Individual Retirement Custodial Account, a Disclosure amendments thereto. I assume sole responsibility for all consequences relating to my actions concerning this Roth IRA. I understand that I revoke this Roth IRA on or before seven (7) days after the date of the date of establishment. My designation of the tax year for my contribu and any election to tr	Community on monital mann				
CRoth IRA Owner Initials Signing below. I Am Not Married. I understand that if I marry in the future, I must complete a new Designation of Beneficiary for (Roth IRA Owner Initials) Which includes the spousal consent documentation. I am the spouse of the Roth IRA owner. Because of the significant consequences associated with giving up my interest in the Roth IRA custodian/trustee has not provided me with legal or tax advice, but has advised me to seek tax or legal advice. I acknowledge that I received a fair and reasonable disclosure of the Roth IRA owner's assets or property and any financial obligations for a community prop state. In the event I have a legal interest in the Roth IRA assets, I hereby give to the Roth IRA owner such interest in the assets held in Roth IRA and consent to the beneficiary designation set forth in this Application. Signature of Spouse Date Signature of Witness (if required) Date (Witness cannot be a beneficiary of this Roth IRA)	the financial organization is should be reviewed to determ	domiciled, the Roth IRA own	er resides, the	e trust is located, the spouse resides, or this tra	ansaction is consummate
Roth IRA Owner Initials) which includes the spousal consent documentation. I am the spouse of the Roth IRA owner. Because of the significant consequences associated with giving up my interest in the Roth IRA, custodian/trustee has not provided me with legal or tax advice, but has advised me to seek tax or legal advice. I acknowledge that I I received a fair and reasonable disclosure of the Roth IRA owner's assets or property and any financial obligations for a community prop state. In the event I have a legal interest in the Roth IRA assets, I hereby give to the Roth IRA owner such interest in the assets held in Roth IRA and consent to the beneficiary designation set forth in this Application. Signature of Spouse Date Signature of Witness (if required) (Witness cannot be a beneficiary of this Roth IRA) Date Cartify that the information provided by me on this Application is accurate, and that I have received a copy of IRS Form 5305-R, Individual Retirement Trust Account or IRS Form 5305-RA, Roth Individual Retirement Custodial Account, a Disclosure Statement, a Financial Disclosure. I agree to be bound by the terms and conditions found in the Agreement, Disclosure Agreement, Financial Disclosure amendments thereto. I assume sole responsibility for all consequences relating to my actions concerning this Roth IRA. I understand that I revoke this Roth IRA on or before seven (7) days after the date of the date of establishment. My designation of the tax year for my contribute and any election to treat a contribution as a rollover or recharacterization, is irrevocable. I indemnify and agree to hold the custodian/trustee cannot provide, and has not provided, me with tax or legal advice. I			f I designate a	primary beneficiary other than my spouse, m	y spouse must consent l
custodian/trustee has not provided me with legal or tax advice, but has advised me to seek tax or legal advice. I acknowledge that I I received a fair and reasonable disclosure of the Roth IRA owner's assets or property and any financial obligations for a community propose state. In the event I have a legal interest in the Roth IRA assets, I hereby give to the Roth IRA owner such interest in the assets held in Roth IRA and consent to the beneficiary designation set forth in this Application. Signature of Spouse Date Signature of Witness (if required) (Witness cannot be a beneficiary of this Roth IRA) Date Certify that the information provided by me on this Application is accurate, and that I have received a copy of IRS Form 5305-R, and individual Retirement Trust Account, a Disclosure Statement, a Financial Disclosure. I agree to be bound by the terms and conditions found in the Agreement, Disclosure Agreement, Financial Disclosure mendments thereto. I assume sole responsibility for all consequences relating to my actions concerning this Roth IRA. I understand that I evoke this Roth IRA on or before seven (7) days after the date of the date of establishment. My designation of the tax year for my contribution as a rollover or recharacterization, is irrevocable. I indemnify and agree to hold the custodian/trustee cannot provided, and has not provided, me with tax or legal advice. I armless against any liabilities. I understand that the custodian/trustee cannot provide, and has not provided, me with tax or legal advice.				in the future, I must complete a new Designa	ation of Beneficiary form
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ADDITIONAL INFORMATION

Purpose. The Roth IRA Application form is designed to assist you in opening a Roth individual retirement account (IRA). This Application will accompany an Internal Revenue Service (IRS) Form 5305-R, *Roth Individual Retirement Trust Account*, IRS Form 5305-RA, *Roth Individual Retirement Custodial Account*, or IRS-approved prototype, a Disclosure Statement, and a Financial Disclosure.

Additional Documents. Applicable law or policies of the Roth IRA custodian/trustee may require additional documentation, such as IRS Form W-9, *Request for Taxpayer Identification Number and Certification*. For a recharacterization, the IRS requires you to provide a written notice of recharacterization.

For Additional Guidance. It is in your best interest to seek the guidance of a tax or legal professional before completing this document. For more information, refer to IRS Publication 590, *Individual Retirement Arrangements (IRAs)*, instructions to your federal income tax return, your local IRS office, or the IRS's web site at www.irs.gov.

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