

INDIVIDUAL RETIREMENT ANNUITY (IRA) SPOUSAL ELECTION FORM

Re: ANNUITANT:  
IRA CONTRACT NUMBER:

I, the designated beneficiary and surviving spouse of the annuitant, am aware that I have the right to continue the above referenced IRA contract as my own or to choose that the contract terminate and receive distribution(s). Please see the following option that I have chosen (1 or 2):

1) \_\_\_\_\_ I do not wish to continue the above referenced IRA contract as my own.

Signature: X \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_ OR \_\_\_\_\_

2) \_\_\_\_\_ I wish to continue the above referenced IRA contract as my own.

My date of birth is: \_\_\_\_\_

My social security # is: \_\_\_\_\_

Under penalties of perjury, I certify that (i) the number shown on this form is my correct taxpayer identification number, and (ii) I am not subject to backup withholding because (a) I am exempt from backup withholding or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding or (c) the IRS has notified me that I am no longer subject to backup withholding and (iii) I am a U.S. person (including a U.S. resident alien).

**Certification Instructions:** You must cross out item (ii) above if you have been notified by the IRS that you are currently subject to backup withholding because of under-reporting interest or dividends on your tax return.

Signature: X \_\_\_\_\_

Address: \_\_\_\_\_

Date: \_\_\_\_\_

**Please send us an original or certified copy of certificate of death if not already sent.**