



# BRIDGES

INVESTMENT FUND, INC.

## IRA BENEFICIARY UPDATE FORM

Name of IRA Shareholder \_\_\_\_\_ Account Number \_\_\_\_\_

Please complete this form to update the beneficiary information associated with your IRA account. It is important to have your beneficiary designations current and accurate. Should you have questions regarding this form, please call **1-866-934-4700**.

I hereby revoke all my prior Designations of Beneficiary and designate the following as my Beneficiary(ies) under my Individual Retirement Account (IRA):

### Beneficiary Information *(If you need more space, please enclose a separate sheet of paper.)*

#### Primary

NAME	RELATIONSHIP	CITY / STATE / ZIP	SOCIAL SECURITY NUMBER	DOB	%
NAME	RELATIONSHIP	CITY / STATE / ZIP	SOCIAL SECURITY NUMBER	DOB	%
NAME	RELATIONSHIP	CITY / STATE / ZIP	SOCIAL SECURITY NUMBER	DOB	%
NAME	RELATIONSHIP	CITY / STATE / ZIP	SOCIAL SECURITY NUMBER	DOB	%

#### Secondary

NAME	RELATIONSHIP	CITY / STATE / ZIP	SOCIAL SECURITY NUMBER	DOB	%
NAME	RELATIONSHIP	CITY / STATE / ZIP	SOCIAL SECURITY NUMBER	DOB	%
NAME	RELATIONSHIP	CITY / STATE / ZIP	SOCIAL SECURITY NUMBER	DOB	%
NAME	RELATIONSHIP	CITY / STATE / ZIP	SOCIAL SECURITY NUMBER	DOB	%

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Spousal Consent: If you name someone other than or in addition to your spouse as primary beneficiary and reside in a community or marital property State, including AZ, CA, ID, LA, NV, NM, TX, WA, and WI, your spouse must consent by signing below.

\_\_\_\_\_  
Signature of Spouse

\_\_\_\_\_  
Date

1. Unless otherwise provided above, (a) every payment under my IRA by reason of my death shall be made to my Beneficiary if he or she is living at the time such payment becomes due; and (b) if there is no designated Beneficiary living at the time any such payment becomes due, the payment shall be made to my estate.
2. A Beneficiary Designation shall be valid only if dated and signed by me and filed with the Custodian under the Plan before my death.
3. The terms, provisions and limitations of the IRA plan and Custodial Agreement, as amended from time to time, are controlling over these General Provisions and shall always govern all rights of myself, my Beneficiaries and all persons claiming under, by or through them, or any of them.