

# Beneficiary Update Form

(To be used for Traditional IRA, ROTH IRA, SEP IRA and SIMPLE IRA accounts)

## Account Holder Information

Account Owner Name				Social Security Number	
Mailing Address (if a PO Box, please provide full street address)		City	State	Zip Code	
( )		Date of Birth		Account Number(s)	
Telephone					

## Designation or Change of Beneficiary

Following my death, the interest in this IRA, account number(s) indicated above, shall be distributed to my beneficiary or beneficiaries indicated herein, pursuant to the provisions of the applicable JP Morgan IRA Custodial Agreement and IRA Disclosure Statement. I hereby revoke any and all prior beneficiary designations for this IRA account, account number(s) indicated above, and make the following beneficiary designation.

**Beneficiary Information.** Please identify as primary or contingent for each Beneficiary named below.

### PRIMARY BENEFICIARY

Name		Percentage	
Relationship	Social Security No.	Date of Birth	
Mailing Address (no PO boxes or care of a third party)			
City	State	Zip Code	

PRIMARY BENEFICIARY OR  CONTINGENT BENEFICIARY

Name		Percentage	
Relationship	Social Security No.	Date of Birth	
Mailing Address (no PO boxes or care of a third party)			
City	State	Zip Code	

PRIMARY BENEFICIARY OR  CONTINGENT BENEFICIARY

Name		Percentage	
Relationship	Social Security No.	Date of Birth	
Mailing Address (no PO boxes or care of a third party)			
City	State	Zip Code	

PRIMARY BENEFICIARY OR  CONTINGENT BENEFICIARY

Name		Percentage	
Relationship	Social Security No.	Date of Birth	
Mailing Address (no PO boxes or care of a third party)			
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PRIMARY BENEFICIARY OR  CONTINGENT BENEFICIARY

Name		Percentage	
Relationship	Social Security No.	Date of Birth	
Mailing Address (no PO boxes or care of a third party)			
City	State	Zip Code	

By signing below, the undersigned represents and warrants that the undersigned is the primary account holder for any JP Morgan account with the account owner name and account number(s) specified at the top of this form.

## Account Holder Signature

X	
Signature	Date
Typed or Printed Name	