



CHECKLIST FOR IRA BENEFICIARY DISTRIBUTION AND INHERITED IRA

This checklist is designed to give you (the beneficiary) guidelines and information needed to process beneficiary distribution requests and to establish or transfer in inherited IRAs. If you have questions about distribution or account transfer processes, please contact a Pacific Premier Trust Client Service Representative at 1-800-962-4238.

DOCUMENTATION NEEDED TO REQUEST A DISTRIBUTION TO BENEFICIARY(IES)

- Checkboxes for: Certified copy of IRA Owner's death certificate, Completed Trust Certification form, Completed IRA Beneficiary Distribution Request form, Certified copy of primary beneficiary's death certificate.

NOTE: If there are multiple beneficiaries, completed distribution forms must be received from all beneficiaries before distributions can be processed. All applicable fees will be deducted from the uninvested cash account before an account is closed. If the cash balance of the uninvested cash account is insufficient, you will receive an invoice for all fees due. The Trust Certification and the IRA Beneficiary Distribution request forms are available at www.PacificPremierTrust.com.

DOCUMENTATION NEEDED TO ESTABLISH AN INHERITED IRA WHEN THE DECEASED IRA OWNER'S ACCOUNT IS AT PACIFIC PREMIER TRUST

To establish an inherited IRA, the non-spouse beneficiary(ies) need to provide all of the documentation listed in the previous section. The application will need to be completed as follows:

The IRA application must be completed by the non-spouse beneficiary(ies) in the name of the deceased IRA Owner, but signed by the beneficiary(ies). See example below.

Account Owner (Client's Name, Dec'd FBO Beneficiary's name)

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_

Social Security Number (Must be the deceased account owner's): \_\_\_\_\_

Date of Birth (Must be the deceased account owner's): \_\_\_\_\_

Mailing Address (Beneficiary's address): \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_

Country: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone (Beneficiary's number): \_\_\_\_\_

DOCUMENTATION NEEDED TO ESTABLISH AN INHERITED IRA WHEN THE DECEASED IRA OWNER'S ACCOUNT IS AT ANOTHER TRUSTEE/CUSTODIAN

Ideally, the inherited IRA should have already been established with the current trustee/custodian before it is transferred to Pacific Premier Trust; however, it is not required.

To establish an inherited IRA when the deceased IRA owner's account is held at another trustee/custodian, we need to have all of the following information:

- Checkboxes for: Certified copy of the IRA Owner's death certificate, Completed IRA Application and Transfer/Rollover form, Completed Trust Certification Form, Documentation (copy of account statement or application), IRS Form 5498.



- Completed Pacific Premier Trust IRA (Traditional, Roth, SEP, SIMPLE as applicable) Beneficiary Distribution Election form if the beneficiary wants to begin distributions when the inherited IRA is transferred and established at Pacific Premier Trust.

NOTE: The Pacific Premier Trust IRA Application with Stretch Provisions is available on our website at [www.PacificPremierTrust.com](http://www.PacificPremierTrust.com). If a designated beneficiary is transferring in more than one inherited IRA, the above-listed documentation is required for each. Inherited IRAs cannot be combined into one account at Pacific Premier Trust unless the decedent is the same for each inherited IRA being transferred. Transfers must be made into the same type of IRA as that of the previous trustee/custodian, i.e., Traditional IRA to Traditional IRA or Roth IRA to Roth IRA.

NON-DEPOSIT INVESTMENT PRODUCTS ARE NOT INSURED BY THE FDIC; ARE NOT DEPOSITS OR OTHER OBLIGATIONS OF, OR GUARANTEED BY, THE BANK OR ANY OF ITS DIVISIONS; AND ARE SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED.

Upload forms to:  
[www.PacificPremierTrust.com/upload](http://www.PacificPremierTrust.com/upload)

Fax to: 303-614-7096

Send mail to:  
Pacific Premier Trust  
Processing Center  
P.O. Box 173859  
Denver, CO 80217-3859

For express deliveries:  
Pacific Premier Trust  
Processing Center  
1560 Broadway, Suite 400  
Denver, CO 80202

Questions?  
Call 1-800-962-4238