

# BMO FUNDS CHANGE OF BENEFICIARY

Traditional IRA, Roth IRA or SEP-IRA

For help with this form, or for more information, call us toll-free at 1-800-236-FUND(3863) or 414-287-8555.

## 1. IRA Owner's Information

Name (first, middle initial, last)

IRA Account Number

Address

City

State

Zip Code

Social Security Number

Birth Date

Birth Date of Spouse (if married)

Email Address

Daytime Phone

Evening Phone

## 2. Beneficiary Information

- I am not married. I understand that if I become married in the future, this form ceases to apply and I must file a new beneficiary designation.
- I am married. If my spouse is not the only primary beneficiary, my spouse has signed the consent and acknowledgement below. If my spouse does not sign the consent, a portion of or all of my IRA may be payable upon my death to my surviving spouse pursuant to applicable state law. If I become divorced in the future, the designation of my former spouse will become void and I must file a new beneficiary designation after my divorce in order to designate my former spouse as a beneficiary.

I hereby revoke all prior beneficiary designations and designate the following beneficiaries for my account.

### Primary Beneficiary(ies):

Beneficiary Legal Name	Social Security Number	Relationship	Date of Birth	%

**\*Special Consent and Acknowledgement** – I consent to this beneficiary designation. I know that this beneficiary designation controls payment of the entire death benefit. If the IRA owner changes this beneficiary designation and dies while married to me, I may have the right to receive a portion or all of his or her IRA benefits unless I, in writing, have consented to and acknowledged the effect of the changed beneficiary designation.

Signature of IRA Owner's Spouse

Date

## 2. Beneficiary Information *(continued)*

**Contingent Beneficiary(ies):** If all of my primary beneficiary(ies) die before me, BMO Funds will transfer ownership of my IRA to my contingent beneficiary(ies).

Beneficiary Legal Name	Social Security Number	Relationship	Date of Birth	%

Multiple Beneficiaries – I understand that if any one of the multiple named primary beneficiaries or contingent beneficiaries dies before me, then the deceased beneficiary's share shall go to the surviving primary or contingent beneficiary(ies), as applicable. I can override this general rule and pass the share of a deceased beneficiary, in equal shares, to his or her issue by right or representation by checking the box and initialing here.  IRA Owner's initials: \_\_\_\_\_

## 3. IRA Owner's Signature

I understand that I may change or add beneficiaries of my IRA at any time during my life by completing, signing and delivering the proper form to my BMO Funds IRA Custodian. The IRA Custodian has advised me to seek tax and legal counsel regarding my beneficiary designation.

\_\_\_\_\_  
Signature of IRA Owner

\_\_\_\_\_  
Date

## 4. Mailing Information

**Regular Mail:**

BMO Funds–U.S. Services  
P.O. Box 219006  
Kansas City, MO 64121-9006

**Overnight Mail:**

BMO Funds–U.S. Services  
430 W 7th Street Suite 219006  
Kansas City, MO 64105-1407