

TradeStation Securities, Inc. Beneficiary Change Form IRA Accounts (Equities)



I. Personal Information (Please complete all blank spaces in Section I).

Name _____ SS# _____

Address _____

City _____ State _____

Zip _____

2. Account Information.

Make this change only on the specific Equities IRA account(s) listed below.

TradeStation Account Number _____ TradeStation Account Number _____

TradeStation Account Number _____ TradeStation Account Number _____

3. Beneficiary(ies): (If more than one Primary beneficiary is listed, make sure percentage is noted and totals 100%).

Primary Beneficiary(ies)	Percentage	Relationship	Date of birth	Social Security No.
	%			
	%			
	%			
	%			
Contingent Beneficiary(ies): (Replaces Primary noted above if Primary predeceases the Contingent)				
	%			
	%			
	%			
	%			

Note: Please consult with your tax and/or legal advisor on the enforceability of your beneficiary designation(s) under your particular state laws. The right to revoke or change any beneficiary designation is hereby reserved. All prior designations (if any) of beneficiaries are hereby revoked. If the beneficiary is a trust, please attach a legal opinion advising that your trust adheres to IRS Publication 590. You acknowledge that by selecting to update all beneficiaries on all TradeStation® accounts, this election is only applicable to accounts where as Equity Trust Company is the custodian. To make a change to the designated beneficiaries of Alternative Investment Accounts, please contact the custodian you have previously chosen to custody the account.

Account Holder Signature:	Date:

Return this completed form by:

EMAIL: ClientExperience@TradeStation.com or

Mail: TradeStation Securities Inc, Attn: Account Services, 8050 SW 10th Street, Suite 2000 Plantation, FL 33324