ROTH IRA

Roth IRA Simplifier®

Roth Individual Retirement Account Application

ROTH IRA HOLDER'S NAME AND PHYSICAL ADDRESS (PO Box Not Permitted – Also Include Mailing Address if Different from Physical Address)	ROTH IRA CUSTODIAN'S NAME, ADDRESS AND PHONE
	GOLDSTAR TRUST COMPANY **P.O. BOX 719** **CANYON, TX 79015-0719** **800-486-6888**

Social Security Number	Home Phone	Business Phone
Date of Birth	**E-mail Address**	

Roth IRA Account Identification

☐ Check here if this is an amendment to an existing Roth IRA.

CONTRIBUTION INFORMATION

Contribution Date	Contribution Amount	Contribution For Tax Year*

**Only applicable for regular contributions (including spousal and catch-up contributions).*

Roth IRA Contribution Type

☐ Regular
☐ Transfer *(from Roth IRA)*
☐ Rollover *(from Roth IRA)*
☐ Rollover from eligible retirement plan
☐ Conversion from IRA
☐ Recharacterization

DESIGNATION OF BENEFICIARY(ies)

The following individual(s) or entity(ies) shall be my primary and/or contingent beneficiary(ies). **If neither primary nor contingent is indicated, the individual or entity will be deemed to be a primary beneficiary.** If more than one primary beneficiary is designated and no distribution percentages are indicated, the beneficiaries will be deemed to own equal share percentages in the Roth IRA. Multiple contingent beneficiaries with no share percentage indicated will also be deemed to share equally.

If any primary or contingent beneficiary dies before I do, his or her interest and the interest of his or her heirs shall terminate completely, and the percentage share of any remaining beneficiary(ies) shall be increased on a pro rata basis. If no primary beneficiary(ies) survives me, the contingent beneficiary(ies) shall acquire the designated share of my Roth IRA.

No.	Beneficiary's Name and Address	Date of Birth	Social Security Number	Relationship	Primary or Contingent	Share %
1.					☐ Primary ☐ Contingent	%
2.					☐ Primary ☐ Contingent	%
3.					☐ Primary ☐ Contingent	%
4.					☐ Primary ☐ Contingent	%
5.					☐ Primary ☐ Contingent	%

SPOUSAL CONSENT

This section should be reviewed if either the trust or the residence of the Roth IRA holder is located in a community or marital property state and the Roth IRA holder is married. Due to the important tax consequences of giving up one's community property interest, individuals signing this section should consult with a competent tax or legal advisor.

CURRENT MARITAL STATUS

☐ **I Am Not Married** – I understand that if I become married in the future, I must complete a new Roth IRA Designation Of Beneficiary form.

☐ **I Am Married** – I understand that if I choose to designate a primary beneficiary other than my spouse, my spouse must sign below.

CONSENT OF SPOUSE

I am the spouse of the above-named Roth IRA holder. I acknowledge that I have received a fair and reasonable disclosure of my spouse's property and financial obligations. Due to the important tax consequences of giving up my interest in this Roth IRA, I have been advised to see a tax professional.

I hereby give the Roth IRA holder any interest I have in the funds or property deposited in this Roth IRA and consent to the beneficiary designation(s) indicated above. I assume full responsibility for any adverse consequences that may result. No tax or legal advice was given to me by the Custodian.

(Signature of Spouse) (Date)

(Signature of Witness) (Date)

SIGNATURES

Important: Please read before signing.
I understand the eligibility requirements for the type of Roth IRA deposit I am making and I state that I do qualify to make the deposit. I have received a copy of the Application, 5305-RA Plan Agreement, the Financial Disclosure and the Disclosure Statement. I understand that the terms and conditions which apply to this Roth IRA are contained in this Application and the Plan Agreement. I agree to be bound by those terms and conditions. Within seven (7) days from the date I open this Roth IRA I may revoke it without penalty by mailing or delivering a written notice to the Custodian.

I assume complete responsibility for:
1. Determining that I am eligible for a Roth IRA each year I make a contribution.
2. Ensuring that all contributions I make are within the limits set forth by the tax laws.
3. The tax consequences of any contribution (including rollover contributions and conversions) and distributions.

I expressly certify that I take complete responsibility for the type of investment instrument(s) I choose to fund my IRA, and that the Custodian is released of any liability regarding the performance of any investment choice I make.

(Roth IRA Holder) (Date)

(Broker Representative) (Date)

(Authorized Signature of Custodian) (Date)

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