



30094

Bundle ID -- B/D Use ONLY

Grid for Bundle ID

Account Number grid

Premiere Select[®] IRA Beneficiary and Successor Beneficiary Designation Form

SSN/TID grid and label: Primary Taxpayer ID or Social Security Number

IMPORTANT: This form is not applicable to minors. In accordance with the Premiere Select IRA and Roth IRA Custodial Agreements and Disclosure Statements, if you are a minor, your beneficiary will be your estate or as otherwise determined in accordance with the applicable state Uniform Gifts to Minors Act or Uniform Transfers to Minors Act.

Please complete all sections of this form to designate a beneficiary or successor beneficiary ("beneficiary") or to change a beneficiary for your Premiere Select Traditional, Roth, Rollover, SEP-IRA, SIMPLE IRA, IRA Beneficiary Distribution Account ("IRA-BDA") or Roth IRA Beneficiary Distribution Account ("Roth IRA-BDA") (each of which is hereinafter referred to as "Premiere Select IRA" or "IRA").

1 Account Information

Owner's First Name grid

Owner's First Name

MI

Last Name grid

Last Name

Suffix

(Please choose IRA Type) Traditional IRA Roth IRA Rollover IRA SEP-IRA Simple-IRA IRA-BDA Roth IRA-BDA

2 Beneficiary Designation

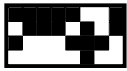
I hereby designate the person(s) named below as primary beneficiary(ies) to receive payment of the value of my Premiere Select IRA specified above upon my death.

- Note: (1) If you wish to designate your estate as your beneficiary, please indicate "Estate" in the Primary Beneficiary section. (2) If your account contains community property and you do not designate your spouse as your primary beneficiary for at least 50% of the value of your account, you may want to consult with your attorney or tax advisor to determine the impact of community property laws on your beneficiary designation.

Primary Beneficiaries

Form 1: Beneficiary designation fields including First Name, Last Name, Trustee, SSN, Date of Birth, and Relationship options (Spouse, Individual, Trust, Entity).

Form 2: Beneficiary designation fields including First Name, Last Name, Trustee, SSN, Date of Birth, and Relationship options (Spouse, Individual, Trust, Entity).



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Account Number

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Premiere Select[®] IRA Beneficiary and Successor Beneficiary Designation Form

Important Information regarding complex/customized beneficiary designations:

Subject to the requirements outlined below, if you wish to make a beneficiary designation for your Premiere Select IRA that is more complex than what can be provided on this form, you may attach a customized beneficiary designation to this form. Consult with your attorney and/or tax advisor for assistance in determining a customized beneficiary designation that is appropriate for you. To be eligible to make a customized beneficiary designation, you must have at least \$100,000 in assets at NFS (includes retirement and non-retirement brokerage and mutual fund assets at NFS). When considering eligibility, your accounts and your spouse's accounts can be combined for the purpose of meeting the minimum balance requirement.

- The beneficiary designation must clearly reference your Premiere Select IRA, including your account number and your Social Security number, and must be signed by you.
- The beneficiary designation must clearly state the name, birth date, Social Security number, and relationship of the beneficiary(ies). In addition, the designation must clearly state the percentage (or amount) of the assets the beneficiary is entitled to receive upon your death.
- If the designation is not specific as to the identity of any beneficiary or the percentage (or amount) each beneficiary is entitled to receive, the designation must clearly state who/what entity will provide the Custodian with written directions as to the identity of and/or the percentage (or amounts) of assets the beneficiary is entitled to upon your death.
- The beneficiary designation must contain language indemnifying and holding harmless FMTC and NFS (and their affiliates, successors and employees) from any loss or liability arising from the distribution of assets pursuant to the designation.
- If you request and receive approval for a customized beneficiary designation, you are responsible for calculating your RMD each year if the RMD calculation is based on joint life expectancy.