

Affidavit of Surviving Children—No Probated Estate



This affidavit is to be completed by the surviving children of the Individual Retirement Account/Education Savings Account (IRA/ESA) owner, whose estate will not be probated, if the IRA/ESA owner has a child or children (including adopted) but does not have a surviving spouse and either:

P.O. Box 219967 | Kansas City, MO 64121
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- The IRA/ESA owner did not file a written beneficiary designation with the Custodian prior to his/her date of death; or
- All designated beneficiaries have predeceased the IRA/ESA owner.

If you have questions, call **1-800-274-3863**.

1 IRA/ESA OWNER INFORMATION (PLEASE PRINT)

We require a copy of the account owner's death certificate with this form.

Name of account owner (first, middle initial, last) Social Security number Date of birth (mm/dd/yyyy)

Fund and account number(s)

2 SURVIVING CHILDREN

Provide the following information for ALL children (as defined under state law applicable to the decedent) who were living at the time of the IRA/ESA owner's death (collectively, "surviving children"). The name is required, regardless of whether or not you have a current address or Social Security number for each surviving child. To name additional surviving children, include all information requested in this section on a separate sheet.

All surviving children may submit one combined affidavit or a separate affidavit may be submitted by each surviving child. If separate forms are completed, the names of ALL surviving children must be listed on each form. The transfer or payment of the IRA/ESA assets will be divided equally among all surviving children. If any of the surviving children are now deceased, their portion of the assets will be distributed per the custodial agreement.

Additional documents are required for each of the surviving children:

1. A copy of the birth certificate or adoption papers as evidence of relationship to the deceased account owner.
2. A completed IRA Distribution Request form with Medallion Guaranteed signature (or Medallion Guaranteed letter of instruction for an ESA). A separate form is required for each surviving child.
3. A completed IRA Application if establishing an Inherited IRA.
4. An inheritance tax waiver if the decedent resided in a state requiring a waiver prior to transferring a decedent's property.

The name of each surviving child is required on this form.

_____ Name of surviving child (first, middle initial, last)	_____ Name of surviving child (first, middle initial, last)
_____ Mailing address	_____ Mailing address
_____ City State ZIP code	_____ City State ZIP code
_____ Social Security number Relationship to deceased	_____ Social Security number Relationship to deceased
_____ Daytime phone	_____ Daytime phone
_____ Date of birth (mm/dd/yyyy) <input type="checkbox"/> Include copy of birth certificate	_____ Date of birth (mm/dd/yyyy) <input type="checkbox"/> Include copy of birth certificate
_____ Date of death (mm/dd/yyyy) <input type="checkbox"/> Include copy of death certificate	_____ Date of death (mm/dd/yyyy) <input type="checkbox"/> Include copy of death certificate

Your signature must be notarized to complete this request.

X _____
Signature of surviving child _____ Print name _____ Date _____
(or authorized individual on behalf of the surviving child)

Notary Public

State of _____ County of _____

On this _____ day of _____, 20____,

before me _____ a notary public, personally
Name of notary public

appeared _____, personally known to me
Name of surviving child

(or proved to me on the basis of satisfactory evidence) to be the person whose name is subscribed to the within instrument and acknowledged to me that he/she executed the same.

X _____
Signature of notary public _____ Notary seal/stamp
My commission expires: _____

Your signature must be notarized to complete this request.

X _____
Signature of surviving child _____ Print name _____ Date _____
(or authorized individual on behalf of the surviving child)

Notary Public

State of _____ County of _____

On this _____ day of _____, 20____,

before me _____ a notary public, personally
Name of notary public

appeared _____, personally known to me
Name of surviving child

(or proved to me on the basis of satisfactory evidence) to be the person whose name is subscribed to the within instrument and acknowledged to me that he/she executed the same.

X _____
Signature of notary public _____ Notary seal/stamp
My commission expires: _____

