

IRA Beneficiary Change Form



Process ID

Complete this form to change the beneficiary designation on your Baird Individual Retirement Account (IRA) (your "IRA"). Submission of this form will revoke all prior beneficiary designations for the IRAs indicated below. Baird does not provide legal or tax advice. Please consult your legal and/or tax advisor to understand how beneficiary designations will affect your overall estate and financial plan.

IRA Holder's Name _____ **Rep Code:** _____

IRA Account Numbers To Be Included in Beneficiary Changes Below

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Beneficiary Designation

I designate the following individuals or entities named below as my primary and/or contingent beneficiary(ies) of the IRA(s) indicated above and hereby revoke all prior beneficiary designations made by me with respect to such accounts.

Beneficiary Name (required)	Spouse (Y/N)	Per Stirpes Designation (Y/N)	Date of Birth	Social Security Number	Primary or Contingent	Share (%)

Beneficiaries must be designated by name and the sum of the percentages for all primary and all contingent beneficiaries must equal 100%, respectively. If multiple primary or contingent beneficiaries are named but no percentages are indicated, the beneficiaries will be deemed to own equal share percentages in the IRA. If you indicate a per stirpes distribution for a named beneficiary and such beneficiary predeceases you, Baird will distribute such beneficiary's portion to his or her living children (natural or legally adopted, not including step-children), if any, in equal shares. If your named beneficiary predeceases you and has no living children or you have not indicated per stirpes distribution with respect to such a beneficiary, his or her portion will be distributed to the other named beneficiaries (primary or contingent (if no primary beneficiaries survive you), as appropriate), if any, in equal shares. Please note that Baird's distribution of per stirpes may differ from the definition of per stirpes under state law or your will or trust.

Any separate Beneficiary Designations Form or attachments you wish to add to this document must be submitted with the Baird IRA Addendum Form #391, signed by the IRA account owner and sent to the Baird IRA department for review and acceptance before Baird will consider it as a valid change.

Signature

By signing this form, I understand and agree as follows: (i) I hereby instruct Robert W. Baird & Co. Incorporated ("Baird") to change my beneficiary designations with respect to the IRAs indicated above and revoke all prior designations with respect to such accounts, (ii) I understand I may modify the beneficiary designations above at any time in writing in a format acceptable to Baird in Baird's sole discretion, and (iii) if I live in a state with community property statutes and have not designated my spouse as the sole primary beneficiary of the IRA Accounts identified above, I represent and warrant to Baird that my spouse has consented to such designation and understand that failure to gather such consent may invalidate my beneficiary designation.

IRA Account Owner	Date