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Transfer On Death - Beneficiary Distribution Form

Please submit this agreement via email, fax or mail as follows:

E-mail - help@interactivebrokers.com (Insert your account number/Estate Processing in the subject line).
Only the following attachment types are accepted: .gif .tiff .tif .jpeg .jpg .png .bmp .pdf.

Fax - (312)984-1017 (Insert your account number in the subject line)

Mail:
Overnight/Courier
Interactive Brokers LLC
Estate Processing
209 South LaSalle Street
10th Floor
Chicago, IL 60604

Postal
Interactive Brokers LLC
Estate Processing
P.O. Box A3770
Chicago, IL 60690-3770

Beneficiary Contact Information

Name: _____

Telephone Number: _____

Email address _____

I,_____ am a designated beneficiary for Account # _____ registered to _____. My Social Security number is _____ - _____ - _____ . My Interactive Brokers account number is (write N/A if you currently do not have an account with IB) _____ .

In accordance with the Transfer on Death Registration Form & Agreement, I am providing this notarized distribution form and a certified copy of the death certificate. In addition, if I do not have an existing account, I have completed an IB Account Application to open a new account. I request that Interactive Brokers transfer the percent of assets indicated in the Transfer on Death Registration Form & Agreement to my Interactive Brokers account.

By: _____

Name: _____

Date: _____

Notary:

STATE OF _____

COUNTY OF _____

On this _____ day of _____, _____, before me appeared _____

Evaluation Version

Important Note

This PDF document was created by an evaluation version of RealObjects PDFreactor 5.2.5996. The evaluation version is fully functional, but includes this information page.

About PDFreactor

RealObjects PDFreactor is a powerful formatting processor for converting HTML and XML documents into PDF. It uses Cascading Style Sheets (CSS) to define page layout and styles. The server-side tool enables a great variety of applications in the fields of ERP, eCommerce and Electronic Publishing.

It allows you to dynamically generate PDF documents such as invoices, delivery notes and shipping documents on-the-fly. Fully integrated clean-up processes also enable the processing of legacy web content. PDFreactor allows you to easily add server-based PDF generation functionality to your application or service. Since PDFreactor runs on a server, the end-user in general does not need any software other than a free PDF viewer.

PDFreactor is a practical choice for software architects, developers and Web designers looking for a cross-platform, easy to deploy, cost-effective HTML and XML printing solution that does not require any XSL-FO skills to quickly achieve great looking results.

For more information visit **www.realobjects.com/PDFreactor**

_____ who acknowledged herself or himself to be the person who executed the Transfer on Death Beneficiary Distribution Form set forth above and acknowledged that he/she executed the same for the purposes therein contained. In witness whereof, I hereto set my hand and official seal.

_____
  Notary Public

My Commission Expires: _____