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 _____ _____ 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: _____