



This form should only be used for traditional, Roth, SEP/SARSEP and/or SIMPLE IRAs. For inherited traditional, Roth and/or SIMPLE IRAs, use the [Inherited IRA Beneficiary Change](#). For non-retirement individual and/or joint tenants with rights of survivorship (JTWROS) accounts, use the [Transfer on Death \(TOD\) Registration Request](#).

If spousal consent is not required, you may update beneficiary information by logging in to your account at www.capitalgroup.com.

Important: The beneficiaries named on this form will replace any existing beneficiary information listed on your account. You must specify ALL primary and contingent beneficiaries on this form even if you are only changing one beneficiary.

1 Account information

First name of IRA owner _____ MI _____ Last _____

Address _____ City _____ State _____ ZIP _____

Email address¹ _____ () _____
Daytime phone _____

Check here to update the mailing address on your account(s).

The beneficiary designation below only applies to the following account(s) or plan ID(s):

SIMPLE IRA participants: If you have a pre-tax and a Roth SIMPLE IRA in the same plan, your beneficiary designation will apply to both accounts.

¹ Your privacy is important to us. For information on our privacy policies, visit www.capitalgroup.com.

2 Beneficiary designation

We encourage you to consult a professional regarding the tax-law and estate planning implications of your beneficiary designation. All stated percentages must be in whole numbers (e.g., 33%, not 33.3%). Percentages must total 100%. If more than one beneficiary is designated and the percentages do not add up to 100%, each beneficiary's share will be based proportionately on the stated percentages. When percentages are not indicated, the beneficiaries' shares will be divided equally.

Notes: • Your spouse may need to sign in Section 3.

- If you need more space, attach a separate page with the name, address, relationship, date of birth or trust, SSN/TIN and percentage for each beneficiary.
- If you name a trust as beneficiary, provide the full legal name of the trust. Example: "The Davis Family Trust."
- We cannot accept beneficiary designations that reference "will" or "trust under will."

A. Primary beneficiary(ies): If any designated primary beneficiary(ies) dies before I do, that beneficiary's share will be divided proportionately among the surviving primary beneficiaries unless otherwise indicated. If no primary beneficiaries survive me, assets will be paid to the named contingent beneficiaries, if any. **Primary beneficiary percentages must total 100%.**

1. _____
First name _____ MI _____ Last name _____ Suffix _____

OR _____
Name of trust or other entity _____

Address _____ City _____ State _____ ZIP _____

Spouse² Child of owner Other person Trust Other entity _____
Date of birth or trust (mm/dd/yyyy) _____ SSN/TIN _____ Whole % only _____%

² By naming my spouse as a beneficiary, I elect to treat such spouse as a beneficiary while we are married. Effective immediately upon the divorce, annulment or other lawful dissolution of my marriage, the designation shall be null and void, unless after the dissolution of my marriage I affirmatively elect to name my former spouse as my non-spouse beneficiary.



2 Beneficiary designation

(continued)

2. _____
First name MI Last name Suffix

Address City State ZIP

Spouse² Child of owner Other person _____
Date of birth (mm/dd/yyyy) SSN Whole % only

3. _____
First name MI Last name Suffix

Address City State ZIP

Spouse² Child of owner Other person _____
Date of birth (mm/dd/yyyy) SSN Whole % only

Important: Section 2-A must be completed prior to completing Section 2-B.

B. Contingent beneficiary(ies): If no primary beneficiary survives me, pay my benefits to the following contingent beneficiary(ies).

If any designated contingent beneficiary(ies) dies before I do, that beneficiary's share will be divided proportionately among the surviving contingent beneficiaries unless otherwise indicated. If no contingent beneficiaries survive me, assets will be paid according to the Custodial Agreement default designation. **Contingent beneficiary percentages must total 100%.**

1. _____
First name MI Last name Suffix

OR _____
Name of trust or other entity

Address City State ZIP

Spouse² Child of owner Other person Trust Other entity _____
Date of birth or trust (mm/dd/yyyy) SSN/TIN Whole % only

2. _____
First name MI Last name Suffix

Address City State ZIP

Spouse² Child of owner Other person _____
Date of birth (mm/dd/yyyy) SSN Whole % only

Footnote:

² By naming my spouse as a beneficiary, I elect to treat such spouse as a beneficiary while we are married. Effective immediately upon the divorce, annulment or other lawful dissolution of my marriage, the designation shall be null and void, unless after the dissolution of my marriage I affirmatively elect to name my former spouse as my non-spouse beneficiary.

You must return this page, even if left blank.

