

Oceanview Life and Annuity Company
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Attach 1) IRS forms W-9 and W-4P, 2) a copy of the decedent's death certificate and 3) a copy of the most recent account statement.

1 Applicant

NAME

2 Inherited Account

ACCOUNT TYPE			
<input type="checkbox"/> Traditional IRA	<input type="checkbox"/> Roth IRA _____	<input type="checkbox"/> 403(b) TSA	<input type="checkbox"/> Other Qualified Plan
DATE OF PURCHASE _____			
DECEDENT NAME		SSN (or TIN)	ACCOUNT NUMBER
RELATIONSHIP TO APPLICANT		BIRTH DATE	DEATH DATE
ADDRESS AT TIME OF DEATH		CITY	STATE ZIP CODE

3 IRS Required Minimum Distribution (For payments via direct deposit, attach form 11426.)

REQUESTED PAYMENT START DATE	PAYMENT MODE
	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semiannually <input type="checkbox"/> Annually

(Complete only if the applicant is the beneficiary of assets from an Inherited IRA account.)

Has the applicant started to receive IRS Required Minimum Distributions?

No Yes : Beginning Year _____

YEAR

Age Used for Calculation _____

AGE

Was the calculation based on multiple beneficiaries?

No Yes : Oldest Beneficiary's Date of Birth: _____

DATE OF BIRTH

4 Previous Account Holder (Complete only if the applicant is the beneficiary of assets from a previously inherited IRA.)

NAME	BIRTH DATE	DEATH DATE
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5 Trust Beneficiary (Complete only if applicable: A trust beneficiary may purchase an Inherited IRA only if it is qualified to do so. For a trust to qualify for an Inherited IRA it must be 1) valid under state law, 2) irrevocable and 3) name identifiable beneficiaries, who are all individuals.)

I am transferring or rolling over inherited assets from an IRA or employer-sponsored retirement plan account to an Inherited IRA for the benefit of a qualifying trust. By checking this box, I certify that the trust is a qualifying, non-spouse beneficiary for the purposes of Section 402(c) of the Internal Revenue Code and is therefore eligible to directly transfer or roll over IRA or employer-sponsored plan assets to an Inherited IRA. I have attached a copy of the trust agreement (or a trustee-certification) along with a complete list of all trust beneficiaries (including contingent and remainder beneficiaries) and a description of conditions applicable to their entitlement.

6 Authorization

I have completed the applicable sections of this form and represent that all information provided is true and accurate. I understand that additional deposits will not be accepted for Inherited IRA contracts.

_____ _____

APPLICANT SIGNATURE DATE