Death of an IRA account owner with Estate beneficiary

Step 1 Gather your documents

Depending on the circumstances, we'll need some documents from you to get started.

Documents we'll need:

- Copy of the death certificate
- Executorship documentation
- A copy of the executor's driver's license or other valid form of ID

We can accept any of the following:

- Driver's license
- U.S. passport or passport card
- Photo or non-photo ID
- Immigration card
- Foreign government-issued passport (must show proof of residence)
- Permanent residence card
- U.S. military or common access card

Distribution Options

If you want to	We'll also need a completed
Take a full distribution	• Beneficiary Request for Distribution Form • State Withholding Election Form (if necessary)
Open an Estate Account with us	• Beneficiary Request for Distribution Form • State Withholding Election Form (if necessary) • Estate Account Application

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Step 2 Send us your documents

Documents can be sent digitally, or by mail. If further steps are necessary, a customer care representative will contact you within 10 days of receiving your documents.

Digital:

Ally customers can send digital versions of their documents to us via secure message by logging in, selecting **Profile & Settings**, then **Secure Messages**, then **Send a New Secure Message**. Non-Ally customers can call customer care at 1-877-247-2559 to receive a secure link for uploading documents.

Mail:

Ally Bank
P.O. Box 951
Horsham, PA 19044

Need additional assistance? Give us a call.

If you have outstanding questions or need additional account information, we can provide it after receiving your documents. Call us at 1-877-247-2559. We'll be glad to help.