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

<table>
<thead>
<tr>
<th>If you want to</th>
<th>We’ll also need a completed</th>
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<tbody>
<tr>
<td>Take a full distribution</td>
<td>• Beneficiary Request for Distribution Form</td>
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<tr>
<td></td>
<td>• State Withholding Election Form (if necessary)</td>
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<tr>
<td>Open an Estate Account with us</td>
<td>• Beneficiary Request for Distribution Form</td>
</tr>
<tr>
<td></td>
<td>• State Withholding Election Form (if necessary)</td>
</tr>
<tr>
<td></td>
<td>• Estate Account Application</td>
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Death of an IRA account owner with Estate beneficiary

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.