



Death of an IRA account owner with Estate beneficiary

Step 1 Call us at 1-877-247-2559

When you're ready, give us a call. We're unable to provide account information until we receive your documents, but it'll help to know more about your specific situation.

Step 2 Gather your documents

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

Documents you'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	<ul style="list-style-type: none">• Beneficiary Request for Distribution Form• State Withholding Election Form (if necessary)
Open an Estate Account with us	<ul style="list-style-type: none">• Beneficiary Request for Distribution Form• State Withholding Election Form (if necessary)• Estate Account Application

Step 3 Send us your documents

A customer care associate will review your documents as quickly as possible. You should hear from us within 10 days of receiving them to discuss next steps if necessary.

Mail documents to: Ally Bank
P.O. Box 951
Horsham, PA 19044