



**Trust Beneficiary Disclosure**

**Name of Trust:**

**Beneficiary:**

Primary

Contingent

*Full Legal Name*

*Relationship*

<input type="text"/>	<input type="text"/>	<input type="text"/>
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*Date of Birth (mm/dd/yyyy)*

*Social Security/Tax ID Number*

*Percentage*

**Beneficiary Address:**

<input type="text"/>	<input type="text"/>
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*Street 1*

*Street 2*

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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*City*

*State*

*Postal Code*

*Country*

**Is this Beneficiary replacing an existing beneficiary previously disclosed to tastytrade?**

No

Yes; terminated beneficiary information listed below

*Full Legal Name*

<input type="text"/>	<input type="text"/>	<input type="text"/>
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*Date of Birth (mm/dd/yyyy)*

*Tax ID Number*

*Percentage*

I understand that it is my responsibility as the Primary Account holder to provide true and current trust settlor/grantor information and to maintain the accuracy of said information for the duration of the account so long as I am the Primary Account Holder on record with tastytrade.

\_\_\_\_\_  
*Trustee Signature*

\_\_\_\_\_  
*Date*

**Email completed forms to [accounts@tastytrade.com](mailto:accounts@tastytrade.com) for processing**