

Get your documents ready before you start

See the account types below for the required documentation. For custodial accounts, refer to the section for the account type that owns the inherited IRA.

Trust

Trust under agreement (UA):

- Trust name and date the trust was established
- Names of all current trustees
- All signature pages of the trust document

Trust under will/testamentary (UW):*

- Title page of the will
- Trust name and date it was established
- Signature of testator (descendants)
- Evidence that the will was filed with the probate court (e.g., *either* a court stamp, *or* a copy of letters testamentary, *or* the court document appointing the trustees)

* Documentation required for inherited IRAs owned by trusts

Estate

Legal document dated or certified within the last 365 days from when the executors of the estate were appointed

Organization

Corporation/Nonprofit:

- *Either* articles of incorporation, *or* a state-issued charter, *or* a certificate of good standing
- Copy of the organization document identifying all authorized persons

Endowment:

- Pages in the trust document that show the name of the endowment
- Copy of the organization document identifying all authorized persons

Foundation:

- *Either* articles of incorporation *or* trust document filed to form the foundation
- Copy of the organization document identifying all authorized persons

Partnership:

- Partnership agreement
- Copy of the organization document identifying all authorized persons

Professional association or limited liability corporation (LLC):

- *Either* articles of incorporation, *or* a state-issued charter, *or* a certificate of good standing for the organization, *or* a similar document
- Copy of the organization document identifying all authorized persons

Sole proprietorship:

- Document filed to form the proprietorship
- Copy of the organization document identifying all authorized persons

Other:

- Copy of the organization document identifying all authorized persons
- **If incorporated:** *Either* a document filed to form the organization or enterprise, *or* evidence of its existence
- **If not incorporated:** *Either* a document filed to form the organization or enterprise, *or* organization bylaws or similar document