



Please do not write or staple above this area. This area is reserved for bar code and processing.

Clarify case #

Interested Party Request

For adding/removing interested parties to an IRA.

Mail or FAX to:

H&R Block Bank
P.O. Box 2569
Omaha, NE 68103

FAX: 866-812-3144

Account Information

Account holder Name _____

Account holder Social Security Number: _____

Account # _____ Account # _____

Account # _____ Account # _____

Add Interested Party to the above listed account(s)

First Name	Last Name	Relationship	Type of Access Authorized <input type="checkbox"/> Phone inquiries <input type="checkbox"/> Duplicate statements
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Address

_____ Street _____ City _____ State _____ Zip _____ Telephone # _____

First Name	Last Name	Relationship	Type of Access Authorized <input type="checkbox"/> Phone inquiries <input type="checkbox"/> Duplicate statements
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Address

_____ Street _____ City _____ State _____ Zip _____ Telephone # _____

Remove Interested Party to the above listed account(s)

First Name	Last Name	Relationship
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First Name	Last Name	Relationship
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Signature(s)

I expressly assume responsibility for any adverse consequences which may arise from these changes and further agree that the custodian shall in no way be held liable. I hereby agree to indemnify and hold H&R Block harmless from any expenses, cost, damages, claims, suits and/or proceedings arising from H&R Block's reliance on the Interested Party form.

This agreement shall be subject to and governed by the laws of the State of Missouri and shall inure to the benefit of H&R Block, it's affiliates, any successors by merger, consolidation or otherwise and shall be bringing upon the customer's heirs, executors, successors, and assigns.

Owner: _____ Date: _____

Co-Owner (if joint accounts): _____ Date: _____



Interested Party - Instructions

This request should be used to designate interested parties to be added to or removed from your account(s). You may authorize interested parties to make inquiries on your account by calling 1-888-OUR-HRBB and/or to receive a duplicate copy of your statements.

This form will not grant Power of Attorney and does not provide authority to request distributions from an account.

Instructions

- Include your Social Security Number and account numbers for any accounts to which an interested party should be added or removed.
- List any interested parties to add to the account (up to two) and designate whether they should be allowed to make phone inquiries and/or receive duplicate statements. If you designate duplicate statements, the mailing address is required.
- List any interested parties to remove from the account (up to two per form).
- Sign and date the form.
- Mail or FAX the completed form to the following:
 - FAX to 1-866-812-3144
 - Or Mail to:

H&R Block Bank
P.O. Box 2569
Omaha, NE 68103
- Once we have received the properly completed form, the interested parties will be noted on the account(s).