Re: account:

Dear,

Please accept our sincere condolences on your loss. We know this is a difficult time for you to be making financial decisions. In an effort to lessen the burden of this obligation we have included a list of available options for your consideration. is the Registered Representative on this account and can be reached at to assist you in making a decision.

# If you choose to keep the account(s) with PlanMember Services;

Enclosed is an application and Suitability Form for your completion.

**We also require the following from you as beneficiary:**

• Completed Qualified Beneficiary Claim Form with a **signature guarantee**.

A signature guarantee can be obtained at your bank or credit union. *We cannot make the distribution without a signature guarantee.*

* Certified Death Certificate
* W-9 Form

Please return the completed form and we will process your request. Feel free to call our client service department at (800) 874-6910 option 2 if we can be of further assistance.

Sincerely,

PlanMember Services Representative