



**ONLY USE WHEN AN IRA PARTICIPANT IS A MINOR**

## 1. Participant Details

Minor Participant's Legal Name

Account Number (if new, leave blank)

Date of Birth

Social Security Number

Age of Majority Date

(Usually the date the child turns 18, check your local state law)

## 2. Responsible Individual Details

Who will be signing on behalf of the minor?

Parent or  Legal Guardian\*

Name of Parent or Legal Guardian

Social Security Number

Date of Birth

Occupation

\*additional documentation required

## 3. Acknowledgment & Signature

By signing this form, I hereby acknowledge and understand that:

- The minor participant must have earned income in order to contribute to an IRA.
- I assume responsibility for verifying the rules of my state of residence as there may be additional restrictions under state law regarding minors.
- I have been advised to seek competent tax, legal, and/or investment advice from qualified third parties.
- Any distribution taken from this account must be issued in the participant's name.
- I am the only individual authorized to conduct transactions on behalf of the minor until they reach the age of majority and am responsible for complying with IRS guidelines.
- Once the minor reaches the age of majority, CamaPlan will no longer recognize me as a signer on this account and will only execute documents signed by the participant.

\_\_\_\_\_  
Responsible Individual's Signature

\_\_\_\_\_  
Date