

### 1 Account Owner Information

NAME (as it appears on your account application)	ENTRUST ACCOUNT NUMBER	ACCOUNT TYPE
EMAIL ADDRESS (required)		DAYTIME PHONE NUMBER

**IS THIS A DISTRIBUTION DUE TO DEATH?**    **YES** (complete this section)    **NO** (skip this section)

BENEFICIARY NAME	BENEFICIARY SSN	BENEFICIARY DATE OF BIRTH	BENEFICIARY PHONE NUMBER
BENEFICIARY HOME ADDRESS		BENEFICIARY CITY, STATE, ZIP CODE	

**NOTE:** Please provide Account Owner's Certified Death Certificate with the form.

### 2 Distribution Type

**THIS DISTRIBUTION IS FROM AN IRA** (Traditional, Roth, SIMPLE, or SEP)

<input type="checkbox"/> NORMAL DISTRIBUTION (over age 59 ½) <input type="checkbox"/> PREMATURE (under 59 ½) <input type="checkbox"/> PREMATURE WITH EXCEPTION FOR SUBSTANTIALLY EQUAL PAYMENTS 72(t) <input type="checkbox"/> NORMAL DISTRIBUTION FOR ROTH IRA (over age 59 ½) <input type="checkbox"/> Qualified Distribution (check this box if you are over age 59 ½ and you have satisfied the 5 year holding period) <input type="checkbox"/> DUE TO DEATH (if you are a beneficiary of this account you must furnish a certified copy of the Death Certificate) <input type="checkbox"/> Transfer to Beneficiary IRA (spouse/non-spouse) <input type="checkbox"/> Transfer to own IRA (spouse only)	<input type="checkbox"/> PERMANENT DISABILITY (pursuant to IRC 72(m)(7)) <input type="checkbox"/> DIVORCE/LEGAL SEPARATION (attach a copy of the divorce decree) <input type="checkbox"/> EXCESS CONTRIBUTION: Year of excess contribution _____ Amount \$ _____ <input type="checkbox"/> DIRECT ROLLOVER TO ANOTHER EMPLOYER PLAN <input type="checkbox"/> REQUIRED MINIMUM DISTRIBUTION <input type="checkbox"/> OTHER:
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**THIS DISTRIBUTION IS FROM A SPECIAL PURPOSE PLAN** (HSA or Coverdell ESA)

<input type="checkbox"/> HSA: QUALIFIED MEDICAL EXPENSE <input type="checkbox"/> HSA: NON-QUALIFIED DISTRIBUTION <input type="checkbox"/> DUE TO DEATH	<input type="checkbox"/> COVERDELL ESA: QUALIFIED EDUCATIONAL EXPENSE <input type="checkbox"/> COVERDELL ESA: NON-QUALIFIED DISTRIBUTION <input type="checkbox"/> OTHER:
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### 3 Distribution Details

**METHOD OF DISTRIBUTION**

<input type="checkbox"/> FULL DISTRIBUTION (close account) <input type="checkbox"/> PARTIAL DISTRIBUTION (only distribute cash/assets as described below) <input type="checkbox"/> CASH ONLY: AMOUNT \$ _____ <input type="checkbox"/> IN-KIND: ASSETS(S) TO BE DISTRIBUTED: _____	<p><b>Would you like to set up a scheduled recurring cash distribution<sup>1</sup>?</b></p> <input type="checkbox"/> YES (select recurrence below) <input type="checkbox"/> NO <input type="checkbox"/> MONTHLY <input type="checkbox"/> QUARTERLY <input type="checkbox"/> SEMI-ANNUALLY <input type="checkbox"/> ANNUALLY Date Payments to Commence: _____
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<sup>1</sup> Recurring distributions are only allowed for fixed amounts. Recurring distributions will remain in effect until provided with a written request to change or cancel, or in case of transaction failure due to insufficient funds.

## 4 Notice of Income Tax Withholding on Distributions

The distributions you receive from your individual retirement account established at this institution are subject to federal income tax withholding unless you elect not to have withholding apply. You may elect not to have withholding apply to your distribution payments by completing the "Withholding Election" section below. If you do not complete the "Withholding Election" section by the date your distribution is scheduled to begin, federal income tax will be withheld from the amount withdrawn at a rate of 10%. If you elect not to have withholding apply to your distribution payments, or if you do not have enough federal income tax withheld from your distribution, you may be responsible for payment of estimated tax. You may incur penalties under the estimated tax rules if your withholding and estimated tax payments are not sufficient.

FEDERAL WITHHOLDING	STATE WITHHOLDING
<input type="checkbox"/> I ELECT NOT TO HAVE FEDERAL INCOME TAX WITHHELD <input type="checkbox"/> I ELECT TO HAVE _____% FEDERAL INCOME TAX WITHHELD <i>(must be greater than 10%)</i> <input type="checkbox"/> IN ADDITION TO THE PERCENTAGE, I ELECT TO HAVE \$ _____ FEDERAL INCOME TAX WITHHELD	<input type="checkbox"/> I ELECT NOT TO HAVE STATE INCOME TAX WITHHELD FROM MY DISTRIBUTION <input type="checkbox"/> I ELECT TO HAVE _____% STATE INCOME TAX WITHHELD FROM MY DISTRIBUTION <sup>3</sup> <small><sup>3</sup> State withholding will only be processed for the following state: California</small>

## 5 Funding Instructions

### Funding Method *(Select one option below)*

1  WIRE    2  ACH    *(complete instructions below or attach instructions; additional fee applies)*

BANK NAME	BANK ABA/ROUTING NUMBER
BANK ADDRESS	CITY, STATE, ZIP CODE
ACCOUNT NAME	ACCOUNT NUMBER
REFERENCE NUMBER	

3  CHECK     IN-KIND DELIVERY

PAYEE NAME	TELEPHONE NUMBER <i>(for overnight deliveries)</i>
PAYEE ADDRESS	CITY, STATE, ZIP CODE

### Check Delivery Instructions

<input type="checkbox"/> REGULAR MAIL	<input type="checkbox"/> OVERNIGHT MAIL <i>(additional fee applies)</i>
<input type="checkbox"/> CLIENT'S ACCOUNT	<input type="checkbox"/> FedEx or <input type="checkbox"/> UPS Account #:

## 6 Signature and Acknowledgement

I certify that I am the proper party to receive payment(s) from this IRA, and that all information provided by me is true and accurate. I acknowledge that I have read the Notice of Withholding below and have completed the Withholding Election above. I further certify that no tax advice has been given to me by the Administrator and/or Custodian that distributions are reported to the IRS, and that all decisions regarding this withdrawal are my own. I expressly assume the responsibility for any adverse consequences which may arise from this withdrawal and I agree that the Administrator and/or Custodian shall in no way be responsible for those consequences.

***I declare that I have examined this document, including accompanying information, and to the best of my knowledge and belief, it is true, correct, and complete.***

PARTICIPANT'S OR BENEFICIARY'S SIGNATURE	DATE
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