



The IRA Club
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DISTRIBUTION REQUEST

A. PARTICIPANT IDENTIFICATION

Name _____ Phone _____ IRA Acct # _____

B. TYPE OF DISTRIBUTION Please check one

- Mandatory distribution for the tax year:**
I will be at least 70 ½ years of age by the end of this tax year
- Normal distribution**
I am over 59 ½ years old
- Early distribution**
I am under 59 ½ years old
- Early distribution; exception applies
- Distribution to be rolled over to another IRA (I understand a penalty may be imposed if not deposited in 60 days)
- Beneficiary distribution
- Return of excess and/or ineligible contribution & earnings for the tax year: _____
- Donation payable to: _____
Address to send check: _____

C. AMOUNT AND FREQUENCY OF DISTRIBUTION

IMPORTANT: If sufficient cash is not available in the custodial cash account, please complete and attach a **LIQUIDATION REQUEST** form

Amount (check one):

- Distribute the following exact amount:
\$ _____
 - Distribute the following assets In Kind
Name and description of asset to be distributed
 - Close my IRA Account and distribute ALL available cash
Yes, I want to close my IRA account listed above
1. _____
2. _____

All assets will be liquidated, if applicable. Liquidation fees + account termination fee apply.
Please ensure you have sufficient cash in your IRA Account to cover the distribution and any fees due

Frequency (check one): One time Only Monthly Quarterly Annually

If more than a onetime only distribution; please start the distributions on: ____/____/____/

D. FEDERAL INCOME TAX WITHHOLDING ELECTION Please check one. Note: 10% default withholding if nothing is selected

- I do NOT want Federal Income Tax withheld (There may be penalties for not paying enough tax through withholding or estimated tax.)
- I want Federal Income Tax withheld from my distributions, \$50.00 minimum, as follows:
Withhold exactly \$ _____ (whole dollars) OR Withhold _____ % (whole percentage)

E. STATE INCOME TAX WITHHOLDING ELECTION Please check one

- I do NOT want State Income Tax withheld (There may be penalties for not paying enough tax through withholding or estimated tax.)
- I want State Income Tax withheld from my distributions, \$25.00 minimum:
IRA Services can only withhold from these states. Please check one if applicable:
 CA GA IA KS MA ME NC OK OR VT

Withhold exactly \$ _____ (whole dollars) OR Withhold _____ % (whole percentage)

F. DELIVERY INSTRUCTIONS

I authorize IRA Services to withdraw the specified funds from my custodial cash account and send me the net amount (less any withheld taxes) by (please check one):

Send a check to my current address of record (distribution may apply) **Check one below**

Send by Regular U.S. Mail

Send by Overnight (overnight fee apply, charge to my account per my application)

Send by Wire (Bank Wire fees apply) Please attaché wire instructions

Direct Deposit (ACH Fees Apply) (For periodic distributions only) Please attach ACH Instructions

G. ACKNOWLEDGEMENT

As set forth in my IRA Services Custodial Agreement, I hereby elect and acknowledge the foregoing distribution. I understand that The IRA Club, IRA Services and the Custodian neither assumes nor implies any liability for the failure of my elected distribution to meet any required minimum distribution requirements under the law and that the amount of the distribution is exclusively mine to make.

Signature of Participant _____ **Date** ____/____/____