

## ACCOUNT INFORMATION (Form must be completely filled out to avoid delay in processing)

Full Name/Account Title: \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
 Street Address (no P.O. Box): \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Daytime Phone: \_\_\_\_\_ Birthdate: \_\_\_\_\_ Email: \_\_\_\_\_  
 Fund(s) Name for Withdrawal: \_\_\_\_\_ Account Number(s): \_\_\_\_\_

I request distribution from my Retirement Account as indicated above. I understand that it is my responsibility to determine that amounts distributed from my account shall be made in compliance with all Internal Revenue Service (IRS) regulations, including required minimum distribution rules and the internal death benefit rule, as applicable.

DISTRIBUTION INFORMATION	WITHDRAWAL AMOUNT (Select One)	REASON FOR WITHDRAWAL (Select One)
Start Date: _____	Gross Amount \$ _____	Normal (over 59 1/2)
Frequency: One-Time Monthly Semi-Annually Annually	Total Distribution _____	Early (Premature)
	Required Minimum Distribution (Based on the uniform lifetime table in IRS regulations. Custodian will automatically distribute RMD until instructed to stop.)	Death Benefit
		Required Minimum Distribution

## SPECIAL PAYMENT INSTRUCTIONS

Name of Charity: \_\_\_\_\_ Federal ID Number: \_\_\_\_\_  
 Street Address (no P.O. Box): \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Send Check to: IRA Holder Charity (Medallion Signature Guarantee required)

## CHARITABLE DISTRIBUTION REQUIREMENTS (To be a qualified charitable distribution, all questions must be answered 'YES')

1. Will you have reached the age of 70 1/2 or older as of the date of this distribution?	Yes	No
2. Does the Distribution meet the deductibility requirements under Internal Revenue Code Section 170, and do you certify that you will receive no additional benefit from the receiving organization in return for this charitable contribution?	Yes	No
3. Does this distribution consist entirely of pre-tax assets from the IRA?	Yes	No
4. Will the amount of the charitable distribution from this IRA, when combined with all other qualified charitable IRA distributions you may be taking in the current year, be \$100,000 or less?	Yes	No
5. Is the receiving organization a church, educational organization, medical organization, private foundation, or other charitable organization under Internal Revenue Code Section 170(b)(1)(A)?	Yes	No

## FEDERAL INCOME TAX WITHHOLDING (If no box is checked 10% will be automatically withheld)

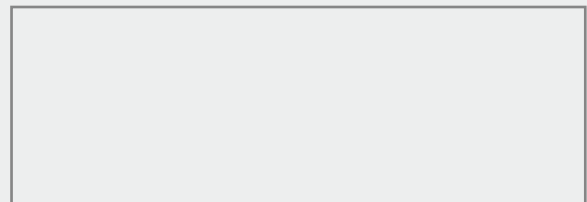
Do Not Withhold Federal Income Tax \$ \_\_\_\_\_ To Be Withheld  
 10% Withholding % To Be Withheld

## REQUIRED SIGNATURES

I certify that all information in this Distribution Request is accurate, and agree to hold Ultimus Fund Solutions harmless for any actions taken as a result of information I have provided. I understand that I am responsible for any tax consequences which may result from the election I have made. I have been advised to consult my tax advisor regarding any questions about this Distribution Request. **If signature guarantee is required, this form must be signed in the presence of the person guaranteeing your signature.**

Owner Signature \_\_\_\_\_

Date \_\_\_\_\_



Medallion Signature Guarantee Stamp

**TYPE OF DISTRIBUTION****Early**

(Premature - subject to penalty tax)

Before the age of 59 1/2. Account holder understands that they may be responsible for paying a 10% premature withdrawal penalty (25% from a SIMPLE IRA if within 2 years of initial SIMPLE participation) in addition to normal income tax for early withdrawal. Converted Roth: Distribution within 5 years from conversion date may be subject to 10% premature withdrawal penalty.

**Early**

(Premature - not subject to penalty tax before age 59 1/2)

- Where medical expenses are in excess of 7.5% of adjusted gross income.
- Used for health insurance premiums and you received unemployment compensation for at least 12 weeks.

**Death\***

Please attach a copy of the Participant's death certificate. Other forms may be required. Please contact a customer service representative for more information.

**Regular Distribution**

Account holder has reached age 59 1/2. Roth or Conversion Roth: Distributions within 5 years may be subject to 10% premature withdrawal penalty.

**Required Minimum Distribution**

Account holder has reached age 72 and is required to begin receiving minimum distributions. Does not apply to Roth and Roth Conversion IRA's.

\* IRS may require additional documentation.