



IRA PERIODIC DISTRIBUTION FORM

Account Holder: _____ IRA Account #: _____

Address: _____ Social Security #: _____

_____ Daytime Phone #: _____

E-Mail Address: _____

AMOUNT AND METHOD OF WITHDRAWAL (Please Check One):

Recurring Distributions (Please check one in each row)

Amount: __ All Cash Available __ Fixed Dollar Amount __ Other(i.e. interest only)

\$ _____

Frequency: __ Monthly __ Bi-Monthly __ Quarterly __ Semi-annually __ Annually

Distribution Date: __ 1st of month __ 15th of month __ 26th of month

Commencement Date _____

WITHHOLDING ELECTION (Please Check One):

Withhold Federal income tax at a rate of _____ % (not less than 10 percent) from the amount withdrawn.

Withhold additional Federal income tax of _____.

Effective" _____, I understand that I am still liable for the payment of Federal income tax on the amount of any distributions received. I also understand that I may be subject to Federal income tax penalties under the estimated tax payments rules if my payments of the estimated tax and withholding are insufficient.

PAYMENT DELIVERY INSTRUCTIONS

(Please Check One):

- ___ **1. Direct payment by check**
- ___ **2. Direct payment via ACH fund transfer.** A voided check must be attached showing the bank's routing number and your bank account number. **(Complete the Direct Deposit / ACH Authorization Form)**
- ___ **3. Direct payment via Bank Wire.** A \$20.00 wire fee applies. A voided check must be attached showing the bank's routing number and your bank account number.
- ___ **4. Alternate payment instructions.** (Complete only if different than name or address on account. Signature Guarantee Required)

RECIPIENT'S ACKNOWLEDGEMENT AND SIGNATURE

I certify that I am the proper party to receive payment(s) from this account and that all information provided by me is true and accurate. I expressly assume the responsibility for any adverse consequences which may arise from this withdrawal and I agree that the Custodian shall in no way be held responsible.

IRA Holder _____ Date _____

Medallion Signature Guarantee _____ (A medallion signature guarantee is required if funds are sent to an address other than the address of record)