

1 Account Owner Information

NAME <i>(as it appears on your account application)</i>	ENTRUST ACCOUNT NUMBER	ACCOUNT TYPE
EMAIL ADDRESS <i>(required)</i>		DAYTIME PHONE NUMBER
<input type="checkbox"/> I WOULD LIKE TO CANCEL MY CURRENT RECURRING DISTRIBUTION. Skip to Section 6		

2 Distribution Type

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

<p><u>Traditional, SEP, SIMPLE</u></p> <p><input type="checkbox"/> NORMAL DISTRIBUTION <i>(over age 59 ½)</i></p> <p><input type="checkbox"/> PREMATURE <i>(under 59 ½)</i></p> <p><input type="checkbox"/> DUE TO DEATH <i>(Distribution to beneficiary)</i></p>	<p><u>Roth</u></p> <p><input type="checkbox"/> QUALIFIED <i>(over age 59 ½)</i> Must satisfy 5-Year Holding Period</p> <p><input type="checkbox"/> NON-QUALIFIED</p> <p style="margin-left: 20px;"><input type="checkbox"/> Under age 59 ½</p> <p style="margin-left: 20px;"><input type="checkbox"/> Over age 59 ½ and has not satisfied 5-Year Holding Period</p> <p><input type="checkbox"/> DUE TO DEATH <i>(Distribution to beneficiary)</i> Is the 5-Year Holding Period satisfied?</p> <p style="margin-left: 20px;"><input type="checkbox"/> Satisfied <input type="checkbox"/> Not Satisfied</p>
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THIS DISTRIBUTION IS FROM A SPECIAL PURPOSE PLAN *(HSA or Coverdell ESA)*

<p><input type="checkbox"/> HSA: DISTRIBUTION</p> <p><input type="checkbox"/> HSA: EXCESS DISTRIBUTION</p> <p><input type="checkbox"/> HSA: DUE TO DEATH</p>	<p><input type="checkbox"/> COVERDELL ESA: DISTRIBUTION</p> <p><input type="checkbox"/> COVERDELL ESA: EXCESS DISTRIBUTION</p> <p><input type="checkbox"/> COVERDELL ESA: DUE TO DEATH</p> <p><input type="checkbox"/> COVERDELL ESA: TRANSFER</p> <p style="margin-left: 20px;"><input type="checkbox"/> ELIGIBLE FAMILY MEMBER</p>
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3 Distribution Details

METHOD OF DISTRIBUTION

How often would you like your distribution to occur¹?

MONTHLY QUARTERLY SEMI-ANNUALLY ANNUALLY

Date Payments to Commence: _____

CASH AMOUNT² \$ _____

This request is to update my current recurring distribution.

¹ Please allow up to **10 business days** before the first distribution. If your account does not have sufficient funds on the requested date, the distribution will not be processed.

² Recurring distributions are only allowed for fixed amounts and will remain in effect until The Entrust Group is provided with a new Recurring Distribution Form requesting to change or cancel an existing one.

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"/> I ELECT NOT TO HAVE STATE INCOME TAX WITHHELD <input type="checkbox"/> I ELECT TO HAVE _____% STATE INCOME TAX WITHHELD ³ ³ State withholding will only be processed for the following state: California

5 Funding Instructions

PLEASE SELECT YOUR FUNDING METHOD: WIRE ACH CHECK CASHIER'S CHECK

For WIRE and ACH *(Please complete the information below)*

BANK NAME		PAYEE NAME		
BANK ABA/ ROUTING NUMBER	ACCOUNT NUMBER	PAYEE STREET ADDRESS		
ACCOUNT HOLDER NAME	CITY	STATE	ZIP CODE	
ADDITIONAL INFORMATION				

For CHECK and CASHIER'S CHECK *(Please complete the information below)*

PAYEE NAME		PAYEE PHONE NUMBER		
PAYEE STREET ADDRESS		CITY	STATE	ZIP CODE
<input type="checkbox"/> MAIL CHECK TO <i>(If different from Payee Address)</i>				
NAME		PHONE NUMBER <i>(for overnight delivery)</i>		
STREET ADDRESS		CITY	STATE	ZIP CODE

SEND CHECK VIA:

<input type="checkbox"/> Regular Mail	<input type="checkbox"/> Overnight Delivery <i>(additional fee applies)</i> <input type="checkbox"/> Overnight Delivery <i>(charge my Entrust Account)</i> <input type="checkbox"/> Overnight Delivery <i>(use third party billing)</i> Account #: _____ <input type="checkbox"/> FedEx <input type="checkbox"/> UPS
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ADDITIONAL INFORMATION

Recurring IRA Distribution Form

Traditional, Roth, SEP, SIMPLE, ESA, HSA

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 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