

## 1 Account Owner Information

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

☐ I WOULD LIKE TO CANCEL MY CURRENT RECURRING DISTRIBUTION. Skip to Section 6

## 2 Distribution Type (select one)

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

#### Traditional, SEP, SIMPLE

- ☐ NORMAL DISTRIBUTION (over age 59 ½)
- ☐ PREMATURE (under 59 ½)
- ☐ DUE TO DEATH (Distribution to Beneficiary)

#### Roth

- ☐ QUALIFIED (over age 59 ½)  
Must satisfy 5-Year Holding Period
- ☐ NON-QUALIFIED
- ☐ Under age 59 ½
- ☐ Over age 59 ½ and has not satisfied 5-Year Holding Period
- ☐ DUE TO DEATH (Distribution to beneficiary)  
Is the 5-Year Holding Period satisfied?
- ☐ Satisfied ☐ Not Satisfied

### THIS DISTRIBUTION IS FROM A SPECIAL PURPOSE PLAN (HSA or Coverdell ESA)

- |   |   |
|---|---|
| <input type="checkbox"/> HSA: DISTRIBUTION        | <input type="checkbox"/> COVERDELL ESA: DISTRIBUTION        |
| <input type="checkbox"/> HSA: EXCESS DISTRIBUTION | <input type="checkbox"/> COVERDELL ESA: EXCESS DISTRIBUTION |
| <input type="checkbox"/> HSA: DUE TO DEATH        | <input type="checkbox"/> COVERDELL ESA: DUE TO DEATH        |
|   | <input type="checkbox"/> COVERDELL ESA: TRANSFER            |
|   | <input type="checkbox"/> ELIGIBLE FAMILY MEMBER             |

## 3 Distribution Details

### METHOD OF DISTRIBUTION

#### How often would you like your distribution to occur<sup>1</sup>?

- ☐ MONTHLY ☐ QUARTERLY ☐ SEMI-ANNUALLY ☐ ANNUALLY

Date Payments to Commence: \_\_\_\_\_

CASH AMOUNT<sup>2</sup> \$ \_\_\_\_\_

- ☐ This request is to update my current recurring distribution.

<sup>1</sup> 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.

<sup>2</sup> 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 <sup>3</sup> <sup>3</sup> State withholding will only be processed for the following state: California

## 5 Funding Instructions

PLEASE SELECT YOUR FUNDING METHOD (select one): ☐ WIRE ☐ CHECK ☐ CASHIER'S CHECK ☐ ACH

For WIRE and ACH (please complete this section if you selected WIRE or ACH)

### ACH PAYMENT NOTICE

Some banks have ACH delivery instructions character limit policies in place. If the bank does not receive all required ACH information due to the character limits, payment processing may not occur. Therefore, selecting ACH could slow down your transaction or result in having to repeat the process if the bank cannot read all the information required to process the payment.

PAYEE NAME	BANK NAME		
FOR FURTHER CREDIT TO	BANK ABA / ROUTING NUMBER	ACCOUNT NUMBER	
PAYEE STREET ADDRESS	CITY	STATE	ZIP CODE
ADDITIONAL INFORMATION			

Form Continues on Page 3

# Recurring IRA Distribution Form

Traditional, Roth, SEP, SIMPLE, ESA, HSA

555 12th Street, Suite 900  
Oakland, CA 94607  
Phone: (800) 392-9653  
Fax: (510) 587-0960  
distributions@theentrustgroup.com

## 5 Funding Instructions

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

PAYEE NAME	PAYEE PHONE NUMBER		
PAYEE STREET ADDRESS	CITY	STATE	ZIP CODE

☐ MAIL CHECK TO (If different from Payee Address)

NAME	PHONE NUMBER (for overnight delivery)		
STREET ADDRESS	CITY	STATE	ZIP CODE

### SEND CHECK VIA:

- ☐ Regular Mail
- ☐ Overnight Delivery (\$30 fee applies; cannot overnight to a PO Box)
- ☐ Charge my Entrust Account
- ☐ Use third-party billing
- ☐ FedEx ☐ UPS Account #: \_\_\_\_\_

ADDITIONAL INFORMATION

## 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
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