

## Required Minimum Distribution Request

Contract Number: \_\_\_\_\_ Contract Owner: \_\_\_\_\_

**PLEASE CHECK ONE BELOW:**

- Process my RMD in the amount of \$\_\_\_\_\_. (This withdrawal could be subject to a contract withdrawal charge or Market Value Adjustment if applicable. Please review your contract provisions.)
- Calculate my RMD and process the withdrawal.

**DISTRIBUTE MY RMD AS FOLLOWS:** (Note: Monthly not available for Equity Indexed Annuity Contracts.)

- EFT (Electronic Fund Transfer):**  Monthly                      **Paper Check:**  Annually
- Automatically each year:**                       Yes \_\_\_\_\_ Month for distribution: \_\_\_\_\_  
 No \_\_\_\_\_ (If yes, Annual Check can be sent via EFT)

**NOTICE:** If you delay taking your first RMD until April 1, you will receive a lump sum payment and you will be required to take your second RMD by December 31 of the same year.

**DIRECT DEPOSIT INFORMATION:**

Financial institution name \_\_\_\_\_ Phone No: \_\_\_\_\_

Type of Account:

- Checking (**must attach voided check here**) Account number: \_\_\_\_\_
- Savings Account number: \_\_\_\_\_ ABA/Routing number: \_\_\_\_\_

**IMPORTANT TAXPAYER INFORMATION**

I understand that if there is a reportable distribution due to the withdrawal, it will be reported to the Internal Revenue Service (IRS) for the calendar year the withdrawal is made. Unless waived by me, if there is a reportable distribution, it will have income tax withheld at a flat rate of 10%. If I am under the age of 59½, an IRS Federal Excise Tax may apply to the withdrawal. State Income Tax withholding is voluntary with the following exceptions: State Income Tax may not be withheld in AK, FL, NH, NV, SD, TN, TX, WA, WY. State Income Tax withholding is mandatory in CT, State withholding is mandatory if Federal Tax is withheld in DC, DE, GA, IA, KS, MA, ME, NC, NE, OK, VA, VT. In the following, State Income Tax is mandatory if Federal Tax is withheld, however you may opt-out in the following states by entering "None" in the State Income Tax section: AR, CA, OR. I further understand that even if I elect not to have Federal Income Tax withheld, any reportable distribution will be reported to the IRS.

**TAX WITHHOLDING ELECTION (Please Check)**

- I do **NOT** elect to have taxes withheld from my payments.
- I **DO** elect to have **federal** income taxes withheld in the amount of \$\_\_\_\_\_ or percentage of \_\_\_\_\_%.
- I **DO** elect to have **state** income taxes withheld in the amount of \$\_\_\_\_\_ or percentage of \_\_\_\_\_%.

**NOTE: TAX AUTOMATICALLY WITHHELD IF WITHHOLDING OPTION NOT ELECTED**

The following statement is required by the IRS: Under penalty of perjury, I certify that the number shown on this form is my correct social security or taxpayer ID number and I am not subject to back-up withholding. I certify that I am not under guardianship, nor have I made any assignment, pledge, or executed any document affecting ownership or right to any monies due or to become due under this contract, and further that no proceedings in bankruptcy are pending to which I am a party.

This form dated at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.  
City/State

Signature of Owner	Owner's Social Security Number or Taxpayer ID Number	(_____) _____ Owner's Telephone Number
Signature of Witness*	(_____) _____ Telephone Number of Witness	_____ Owner's E-mail Address (if available)

\*Owner's signature must be witnessed by an adult who is not a Beneficiary or newly named Owner.