

**REQUIREMENT:** To comply with IRS reporting procedures, submit a valuation report of each asset you wish to distribute. The valuation must be certified by a licensed professional such as a CPA or Licensed Appraiser. IRA Club does not offer appraisal or tax advising services. Please consult a tax advisor to determine the tax consequences and further reporting methods. IRA Club will mail Form 1099-R to you for the tax year in which you take the distribution. IRA Club will send the 1099-R forms by January 31st of the following tax year to the primary address on your account for the tax year in which you take the distribution.

**1. ACCOUNT OWNER INFORMATION**

FULL NAME	IRA CLUB ACCOUNT NUMBER
LAST 4 OF SSN	PHONE NUMBER

**2. DISTRIBUTION TYPE**

Do not use this form to transfer funds to another firm. Select one distribution type below.

- |   |  |
|---|--|
| <input type="checkbox"/> NORMAL (59 ½ OR OLDER)                     | <input type="checkbox"/> ACCOUNT TERMINATION           |
| <input type="checkbox"/> EARLY (UNDER 59 ½)                         | <input type="checkbox"/> DIVORCE                       |
| <input type="checkbox"/> RETURN OF CONTRIBUTION FOR TAX YEAR 20____ | <input type="checkbox"/> REQUIRED MINIMUM DISTRIBUTION |
| <input type="checkbox"/> BENEFICIARY/DEATH                          |  |

**3. DISTRIBUTION OF ASSETS**

All accounts must maintain a minimum balance of \$500.00. If you are terminating your account, check the second box.

- |  |   |
|--|---|
| <input type="checkbox"/> DISTRIBUTE <u>ONLY</u> THE ASSETS BELOW | <input type="checkbox"/> DISTRIBUTE AND CLOSE ACCOUNT<br>*Termination fees apply. |
|--|---|

ASSET	TOTAL APPRAISED VALUE \$	NUMBER OF UNITS	PRICE PER SHARE
ASSET	TOTAL APPRAISED VALUE \$	NUMBER OF UNITS	PRICE PER SHARE
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**4. FEDERAL & STATE TAX WITHHOLDING**

Asset distributions from your IRA Club account may be subject to federal and state income tax withholding. It is your responsibility to determine the estimated tax you will owe from this distribution should it apply.

INITIAL HERE
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**5. DOCUMENT FORWARDING INSTRUCTIONS**

- VIA EMAIL     
  VIA REGULAR MAIL     
  VIA FEDEX OVERNIGHT

ADDRESS
EMAIL ADDRESS

**6. DISTRIBUTION PROCESSING FEES** debit from the account automatically. If you would like to have these fees charged to a credit or debit card instead, complete the information below.

CREDIT/DEBIT CARD NUMBER	EXPIRATION DATE & CVV	BILLING ZIP CODE
NAME ON CREDIT CARD		

**7. ACKNOWLEDGEMENT AND SIGNATURE**

By signing below, you hereby direct IRA Club to process this distribution. You understand that federal and state tax may be due and hereby opt not to have such tax withheld. You understand that IRA Club reports distributions to the IRS on Form1099-R and that IRA Club does not provide tax or legal advice.

SIGNATURE	DATE SIGNED
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**HOW TO RETURN THIS FORM:**

- ✓ Complete, Sign and Date the form.
- ✓ Fax, Email or Mail the form using the information below.

**QUESTIONS?** We are available via phone Monday-Friday between 9:00 AM - 5:00 PM CT - Call 312-795-0988