

## Distribution Form/Notice of Withholding

Traditional IRA, Roth IRA, Education Savings, Health Savings

### 1. ACCOUNT HOLDER INFORMATION *Please complete the following information.*

Account Holder's Name: \_\_\_\_\_

Your Account Number: \_\_\_\_\_ Type: (Check One)  Traditional IRA  SEP IRA  SIMPLE IRA  
 Roth  Coverdell ESA  HAS

Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Your Social Security Number: \_\_\_\_\_ Telephone Number: (\_\_\_\_) \_\_\_\_\_

#### For death distributions, complete the following:

Beneficiary Name: \_\_\_\_\_ Beneficiary Date of Birth: \_\_\_\_\_

Beneficiary Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Beneficiary Social Security Number: \_\_\_\_\_ Telephone Number: (\_\_\_\_) \_\_\_\_\_

### 2. TYPES OF DISTRIBUTION (CHECK ONLY ONE and fill in where applicable)

#### Distribution Reason for Traditional, Roth & SIMPLE IRA

- Early (premature) distribution** Participant is under age 59½ and no other code applies.
- Early (premature) distribution** Substantially equal payment exception applies.
- Normal Distribution** (If you are the Participant and age 59½ or older).
- Removal of Excess/Nondeductible Contribution** plus earnings before tax filing deadline. Is the contribution plus earnings being removed in the same year?  Yes  No  
In which tax year was the contribution made? \_\_\_\_\_
- Permanent Disability** If you are disabled within the meaning of section 72(m)(7) of the Internal Revenue Code.
- Death** If you are a beneficiary of this account you must furnish a certified copy of the Death Certificate.  
 Transfer to Beneficiary IRA
- Transfer Due To**  Divorce or  Legal Separation.  
A copy of the divorce decree must be attached.  
Payable to: \_\_\_\_\_
- Re-characterization to a Traditional IRA**  
Contribution of \$ \_\_\_\_\_ Earnings of \$ \_\_\_\_\_
- Roth IRA non-qualified distribution**
- Distribution from a SIMPLE IRA**  
Date Employee First Participated: \_\_\_\_\_

**Conversion to a Roth IRA**

**IRA paid directly to Trustee of employer's plan**  
Payable to: \_\_\_\_\_

#### Distribution Reason for Education Savings Account

- Distributions from this account are being used for qualified education expenses of the designated beneficiary.
- This distribution is not being used for qualified education expenses and none of the other reasons below apply.
- Permanent disability of the designated beneficiary (within the meaning of section 72(m)(7) of the Internal Revenue Code).
- Death (You are the representative of the Designated Beneficiary's estate and can furnish a certified copy of the Death Certificate).
- Removal of Excess/Nondeductible Contribution plus earnings before tax filing deadline  
Is the contribution plus earnings being removed in the same year?  
\_\_\_\_\_ Yes \_\_\_\_\_ No  
In which tax year was the contribution made?
- Transfer, including Transfer Incident To Divorce or Legal Separation. Payable to: \_\_\_\_\_
- This Coverdell ESA is being rolled over or transferred to another Coverdell ESA for the following family member: \_\_\_\_\_

#### Distribution Reason for Health Savings Account

- This distribution is from a Health Savings Account