



member's name: ~ address: ~ ~ ~ country: ~	member account no.: ~ daytime phone no.: ~ social security no.: XXX-XX-~ withdrawal amount: ~ <u> </u> check if complete close of IRA
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☐ Revocation of new IRA. (Must be within 7 days of initial deposit – HDQCU only).

Service Center Withdrawals		Withdrawals processed by IRA Specialist - HDQCU	
☐ J ROTH PRIOR 59.5 NO EX — Under age 59.5. May be deposited as a rollover deposit to an IRA within 60 days from date of receipt. If you elect to use this distribution as a rollover deposit, effective January 1, 2015, an IRA owner may complete only ONE IRA rollover per 365 days, regardless of how many IRAs owned without differentiating between Traditional, ROTH, and SEP IRAs.	☐ EXCESS CONTRIBUTION WITHDRAWAL — I made this excess contribution on _____. (check one box below)		
<i>Exceptions to the 10% IRS imposed penalty on interest withdrawals must be documented on your Federal Income Tax Return.</i>	☐ 8 CURRENT YEAR EXCESS CONTRIBUTION — Withdrawn BEFORE TAX RETURN due date. Contribution was made in the same year as this withdrawal. Income attributable to the excess contribution may be subject to a 10% IRS penalty.		
☐ T ROTH OVER AGE 59.5 OR DISABILITY PRIOR TO AGE 59.5 — May be deposited as a rollover to an IRA within 60 days from date of receipt. If you elect to use this distribution as a rollover deposit, effective January 1, 2015, an IRA owner may complete only ONE IRA rollover per 365 days, regardless of how many IRAs owned without differentiating between Traditional, ROTH, and SEP IRAs.	☐ P PRIOR YEAR EXCESS CONTRIBUTION — Withdrawn BEFORE TAX RETURN due date. Contribution was made in the year prior to this withdrawal. Income attributable to the excess contribution may be subject to a 10% IRS penalty.		
☐ Q QUALIFIED ROTH — Owner meets both 5-year holding period and qualified reason test. — The 5-year holding period begins January 1st of the first year for which the first regular or conversion contribution was made. This is true even if the contribution is made between January 1st and the tax return deadline and attributed to the prior year. For IRA conversion contributions, the period begins January 1st of the first year in which the conversion was made. It does not matter in which month of the year the contribution was completed. To meet the qualified reason test, owner reaches age 59.5 or is disabled or deceased.	☐ 0 DIRECT TRANSFER TO AN IRA OWNED BY MY EX-SPOUSE — This form must be signed by member in addition to receiving the properly signed transfer form from the other institution. We also require a copy of the divorce decree.		
	☐ PERIODIC DISTRIBUTIONS \$ _____ ☐ Monthly ☐ Quarterly ☐ Yearly Starting _____ (month) (year)		
	☐ MONTHLY DIVIDEND WITHDRAWALS		

Remarks: _____
Please refer to IRA custodial agreement and disclosure statement for further information.

Withholding from IRA payments, when combined with other withholding, **MAY** relieve you from payment of estimated income tax. However, you may still be responsible for payment of estimated tax even if you elect to have withholding from these payments. You may incur penalties under the estimated tax rules if your withholding and estimated tax payments are insufficient. The amount of Income Tax you pay is not affected by your withholding decision.

<p>Federal (check one)</p> <p>☐ Withholding: I want 10% Federal Income Tax withheld from my payment(s).</p> <p>☐ No withholding: I do not want 10% Federal Income Tax withheld from my payment(s).</p>	<p>State (check one)</p> <p>Residents of California</p> <p>Withholding: I want State Income Tax withheld from my payment(s).</p> <p>☐ 1% withheld for State of California.</p> <p>☐ No withholding: I do not want State Income Tax withheld from my payment(s).</p>
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date

A836-R11/14~