



### IRA Distribution Request Form

#### Account Holder Information

Full Name \_\_\_\_\_ Social Security  
Number \_\_\_\_\_  
Phone # \_\_\_\_\_ Date of Birth \_\_\_\_\_ Status  US Citizen  Resident  
Alien Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_  
Zip \_\_\_\_\_

**Account Info** (check all that apply) Account # \_\_\_\_\_.

- Traditional (Pretax)  Roth (After-tax)  SEP  Simple  Inherited

#### Distribution Information

- One time  Monthly on the \_\_\_\_\_, of each month (must renew every calendar year)  
Method  
 Issue Check to me, Send to address above.  
 Deposit by Wire to My Account at ACCT # \_\_\_\_\_ Routing # \_\_\_\_\_  
 Deposit by ACH to My Account at ACCT # \_\_\_\_\_ Routing # \_\_\_\_\_  
 In Kind Asset Described as: \_\_\_\_\_

Applicable Special Codes for reporting \_\_\_\_\_ (See 1099-r instructions)

#### Amount

Requested \_\_\_\_\_.  
Fed W/H \_\_\_\_\_.  
Total to Me \_\_\_\_\_.

- I elect not to have income tax withheld** (No fed W/h listed above)

**I hereby certify that my information is true and correct, and that I understand the tax ramifications of this distribution based on my age and specific type of account, and the rules associated with this account. I understand I am responsible for any tax ramifications, and have discussed this with my competent tax professional. If I have selected a special code I understand that Sunwest Trust Inc. has discretion not report that code without sufficient evidence as to it being true and applicable.**

Signed This \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.  
Month year

Signature of accountholder \_\_\_\_\_.

Custodian Acknowledges receipt \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.  
Month year

Custodian Signature \_\_\_\_\_