

VIP Services: (888) 855-9856 | info@trustprovident.com
8880 W. Sunset Rd., Suite 250, Las Vegas, NV 89148

Section 1 Account Owner Information

First Name MI Last Name Date of Birth (MM-DD-YYYY) - -

Email Last Four Digits of Social Security Number Account Number

Section 2 Distribution Processing

Select one New Payment Setup Modify/Replace Existing Payment Stop/Cancel Existing Payment

Section 3 Distribution Type

Select one Normal Distribution (Age 59½ or older) Substantially Equal Periodic Payments
 Early Distribution (Under age 59½) Death Distribution from an Inherited IRA


Section 4 Distribution Amount and Frequency

Indicate the amount and frequency of each payment. All accounts are required to maintain a minimum cash balance of \$500. If your request would drop your balance below this amount, the request may not be processed. Recurring distributions will continue until we receive written direction from you to cancel.

Gross Distribution Amount Per Payment \$ Starting Month Day Preferred 1st 15th

Frequency of Future Payments (Select one)

Monthly Quarterly Semi-annually Annually

 In order to ensure this recurring distribution request will be processed by your selected start date, you must have available funds in your account and this distribution request must be received (with a copy of a voided check if you want ACH payments) no later than 10 business days before the selected start date.

Section 5 Withholding Information (Form W-4P/OMB No. 1545-0074)

Complete this withholding section only if your distribution is NOT eligible to be rolled over.

If your distribution is eligible to be rolled over to an IRA or retirement plan, but is paid to you, we are required to withhold 20% federal income tax and applicable state income tax. You cannot waive this withholding.

Federal Withholding (Select one)

If your distribution is not eligible to be rolled over, you may elect to waive withholding or you may elect to withhold federal income tax of 10% or more. If you do not make an election, 10% federal withholding will apply.

Withhold Federal Income Tax of % from the amount withdrawn. (Must be 10% or greater.)

Do Not Withhold Federal Income Tax

I understand that I am liable for the payment of federal income tax on the amount of any distribution received and that I may be subject to penalties under the estimated tax payment rules if my payments of the estimated tax and withholding are insufficient.

State Withholding (If applicable, select one)

Name of Withholding State

Withhold State Income Tax of % from the amount withdrawn.

Withhold State Income Tax of \$ from the amount withdrawn.

DO NOT Withhold State Income Tax. (Varies by state; please check your state's laws to determine applicability.)

I understand that I am still liable for the payment of state income tax on the amount of any distributions received and that I may be subject to penalties if my payments are insufficient.

Section 6

Payment Method

See the current Fee Schedule for applicable fees.

Option 1: Mail a check to the following payee

Payee Name

Payee Tax ID Number

Address

City

State

Zip

Check Delivery Options: Regular Mail Priority Mail Overnight Mail

Option 2: ACH funds directly to the payee's bank



Please include a copy of a voided check. The ACH will not be completed prior to receiving the voided check.

Bank Name

Bank Address

City

State

Zip

Payee Name (On bank account)

Payee Tax ID Number

Payee Address

City

State

Zip

Account Number

ABA Routing Number

Section 7

Account Owner Agreement and Authorization

Important: Please read before signing.

I certify that I am authorized to take distributions from this Account and that all information provided by me is true and accurate. I have received a copy of the Withholding Notice Information. No tax advice has been given to me by the custodian. All decisions regarding this distribution are my own, and I expressly assume responsibility for any consequences that may arise from this distribution. I agree that the custodian is not responsible for any consequences that may arise from processing this distribution request.

Account Owner Signature

Account Owner Name (Please type or print)

Date



Congratulations! You are now able to submit your completed request.

Before you submit this form please review all completed information prior to signing. When ready, mail, email, or fax this completed form to:

Mail to: Provident Trust Group
8880 W. Sunset Rd., Suite 250
Las Vegas, NV 89148

Email to: distributions@trustprovident.com

Fax to: (702) 253-7565

Withholding Notice Information *(Form W-4PIOMB No. 1545-0074)*

DISTRIBUTIONS THAT ARE NOT ELIGIBLE ROLLOVER DISTRIBUTIONS

Election of No Withholding. If your distribution is not an eligible rollover distribution you may elect not to have withholding apply. Check the withholding box (or boxes) if you do not want any Federal (or State, if applicable) income tax withheld from your distribution. Even if you do not have income tax withheld, you are liable for payments of income tax on the taxable portion of your distribution. You may also be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding, if any, are not adequate.

The election to not have withholding apply does not apply to any periodic or nonperiodic distributions that are delivered outside the U.S. or its possessions to a U.S. citizen or resident alien. If you are a non-resident alien, do not complete this section. Your distributions are generally subject to a tax-withholding rate of 30 percent. A reduced withholding rate, including exemption, may apply if there is a tax treaty between your country of residence and the United States, and you submit Form W-8BEN, *Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding*, or satisfy the documentation requirements as provided under the regulations.

Nonperiodic Distributions. If you do not waive withholding on any nonperiodic distribution that is not an eligible rollover distribution, Federal income tax will be withheld at the rate of 10 percent, unless you specify a greater rate.

CAUTION: Remember that there are penalties for not paying enough tax during the year, either through withholding or estimated tax payments. New retirees, especially, should see Publication 505. It explains the estimated tax requirements and penalties in detail. You may be able to avoid quarterly estimated tax payments by having enough tax withheld from your pension or annuity using Form W-4P.

State Withholding. Depending on your state of residency, the custodian may be required to withhold state income tax at a rate specified by your state, unless you waive it.