

**REQUEST FOR MINIMUM REQUIRED DISTRIBUTION**

**TRADITIONAL, BEFORE-TAX ACCOUNT**

**ROTH 403(B) AFTER-TAX ACCOUNT**

WDW640 (1/22)

According to our records, you have attained at least the age of 72. The Internal Revenue Code provides that, **for the retired participant**, a minimum required distribution must be made for the year in which a participant reaches age 72 and for each year thereafter. Based upon your life expectancy and, if applicable, your beneficiary's life expectancy (as determined by IRS tables), the minimum required distribution amount has been calculated for you. (*Participants who do not take the required minimum distribution in a taxable year are required to pay to the IRS a non-deductible excise tax of 50% of the difference between the required amount and the amount actually distributed.*) **Please respond before November 1.**

**PERSONAL INFORMATION:**

Name: First: \_\_\_\_\_ MI: \_\_\_\_ Last: \_\_\_\_\_ Member/Ministerial File No.: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Telephone No.: \_\_\_\_\_ Soc. Sec. No.: \_\_\_\_\_

E-mail address: \_\_\_\_\_@\_\_\_\_\_

Marital Status:  Married  Single  Widow/Widower Gender:  Male  Female

**WITHDRAWAL INFORMATION (Check one box)**

- I hereby request a withdrawal of \$\_\_\_\_\_ from my account in the Church of God Ministers' Retirement Plan in order to comply with the Minimum Required Distribution rules.

**TAX WITHHOLDING INFORMATION FOR TRADITIONAL, BEFORE-TAX ACCOUNTS *ONLY*:**

I understand that most withdrawals (exceptions may apply to distributions qualifying as "housing allowance" for ministers) are subject to Federal income tax. I also understand there may be certain state income tax liabilities.

\_\_\_\_\_ I ELECT **TO HAVE** FEDERAL INCOME TAX (20%) WITHHELD FROM MY TRADITIONAL, BEFORE-TAX ACCOUNT.

\_\_\_\_\_ I ELECT **NOT** TO HAVE FEDERAL INCOME TAX (20%) WITHHELD FROM MY TRADITIONAL, BEFORE-TAX ACCOUNT.

**DATE AND SIGNATURE (If married, both you and your spouse must sign.)**

Member's signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse's signature \_\_\_\_\_ Date \_\_\_\_\_

**SUBSCRIBED AND AFFIRMED TO AND BEFORE ME, BOTH PARTIES SIGNING ABOVE,**

this the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

State \_\_\_\_\_ County \_\_\_\_\_

My commission expires \_\_\_\_\_

Notary Public