



• Post Office Box 4608 • Cleveland, Tennessee 37320-4608

### REQUEST FOR REQUIRED MINIMUM DISTRIBUTION - ROLL-INS

TRADITIONAL, BEFORE-TAX ACCOUNT

ROTH 403(B) AFTER-TAX ACCOUNT

WDW645 (07/23)

According to our records, you have attained at least the age of 73. The Internal Revenue Code provides that, a required minimum distribution must be made for the year in which a participant reaches age 73 and for each year thereafter. Based upon your life expectancy and, if applicable, your beneficiary's life expectancy (as determined by IRS tables), the required minimum distribution amount has been calculated for you as shown below. (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 25% 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

- I request **ONLY** the Required Minimum Distribution.
- I hereby request a withdrawal of \$\_\_\_\_\_ (**NET AMOUNT**) from my account (the amount must be **greater** than the Required Minimum Distribution amount).

#### 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 TAXES WITHHELD. (NOTE: Even if you elect not to have Federal Income Tax withheld, you are liable for payment of Federal Income Tax on the withdrawal. You may be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding, if any, are not adequate.) **If you do not expect to be required to file a tax return, check this box.**

#### 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 \_\_\_\_\_