Trust Company OF AMERICA

IRA BENEFICIARY DISTRIBUTION FORM

Account Number _____

Account Title _____

SECTION I
Account Owner Information

_____
First Initial Last Name

_____
Date of Death (attach **certified** copy of death certificate)

SECTION II
Beneficiary Information

A. General

_____
First Initial Last Name

_____
Social Security Number

_____
Date of Birth

_____
Street Address + Apartment or Box Number

_____
City State Zip+ 4

B. Relationship (choose one)

☐ Spouse as sole primary beneficiary
☐ Spouse beneficiary
☐ Non-Spouse beneficiary

C. Spousal Consent

Required **ONLY** when the spouse is NOT the primary beneficiary.

To induce Trust Company of America to distribute the assets held in my deceased spouse's IRA to the individual(s) named as beneficiary(ies) in the IRA Account Application or any subsequent Change of Beneficiary form, I represent and warrant that as of the date hereof I have no community property interest in the IRA assets referenced above, and I direct Trust Company of America to distribute such assets to the individual(s) named as beneficiary(ies) in the IRA Account Application or subsequent IRA Change of Beneficiary form applicable to the IRA in reliance upon this representation.

_____
Spouse's Signature

_____
Print Name Date

SECTION III
Distribution Instructions

A. Amount (choose one)

☐ Please liquidate all assets and close the account.
☐ Please reregister all assets to me and close the account.
☐ Lump sum distribution $_____.
(Liquidation instructions below in part C.)
☐ Reregister specific asset(s) to me.
(Asset breakout listed below in part C.)

B. Payment Options

Send payments to: (choose one)
☐ Wire funds to bank. (Please complete Bank Information in Section VI.)
☐ Send check to me at address of record.

C. Specific Asset Instructions

Choose one: ☐ Sell ☐ Reregister

_____ _____
Asset Name Dollar Amount/Shares/% of asset

Choose one: ☐ Sell ☐ Reregister

_____ _____
Asset Name Dollar Amount/Shares/% of asset

Choose one: ☐ Sell ☐ Reregister

_____ _____
Asset Name Dollar Amount/Shares/% of asset

SECTION IV
Transfer Instructions

☐ Transfer the account to an IRA in my name. My existing account # is _____ or I have attached a new IRA account application.
(Applicable only to SOLE primary spouse beneficiaries.)

☐ Transfer the account to a beneficiary IRA in my name. A new IRA account application is attached.

☐ Transfer the account to my IRA at a different custodian. Transfer paperwork is attached. (Applicable only to SOLE primary spouse beneficiaries.)

☐ Transfer the account to my beneficiary IRA at a different custodian. Transfer paperwork is attached.

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SECTION V
Withholding Elections

(Fill out this section ONLY if you completed Section III.)

A. Federal (choose one)

☐ Withhold Federal income tax of _____% (not less than 10%) from the amount withdrawn.

☐ I elect not to have Federal income tax withheld. I understand that I am still liable for the payment of Federal income tax on the amount received. I also understand that I may be subject to Federal income tax penalties if my payments of the estimated tax and withholding are insufficient.

B. State (choose one)

State tax withholding election through Trust Company is available for the states listed on the Trust Company website, www.trustamerica.com/self-directed-ira/account_forms. If your state is listed on our website, you can elect state tax withholding, by selecting one of the options below:

☐ Withhold state income tax of _____% or _____ from the amount distributed for the state in the address of record for this Trust Company Account. *Note: Amounts will be rounded to the nearest whole dollar.*

☐ I elect not to have state income tax withheld.

IMPORTANT: State tax will be withheld if, at the time of your distribution, your address is within one of the mandatory withholding states. If you request withholding for a state not included on the Trust Company website no state tax withholding will be applied.

SECTION VI
Bank Information (if applicable from Section IIIB above.)

Bank Name

Account Name (Must be the same as beneficiary in Section II.)

Account Number Bank ABA (Routing) Number

SECTION VII
Tax ID Certification

By signing below, I certify, under penalties of perjury, that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: **(a)** I am exempt from backup withholding, or **(b)** I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or **(c)** the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. person (including a U.S. resident alien).

Certification Instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN.

I understand that the IRS does not require my consent to any provision of this document other than certifications required to avoid backup withholding.

SECTION VIII
Signature

Participant Signature Date

I certify that I am the proper party to receive payment from the IRA and that all information provided by me is true and accurate. I further certify that Trust Company of America has given no tax advice to me. All decisions regarding this withdrawal are my own. I expressly assume the responsibility of any adverse consequences that may arise from this withdrawal and I agree that Trust Company of America shall in no way be held responsible.

Beneficiary Date

Authorized Signature of Custodian/Trustee Date

A signature guarantee must be provided on all requests for distribution in excess of $50,000 mailed by check to the address of record OR distribution over $20,000 sent by federal wire service to a checking or savings account.

Signature Guaranteed by:

Notary Acknowledgement: