



Distribution Request for Assets Only

► Email to: distributions@iraclub.com
► Support: (312) - 795-0988

REQUIREMENT: To comply with IRS reporting procedures, submit a valuation report of each asset you wish to distribute. The valuation must be certified by a licensed professional such as a CPA or Licensed Appraiser. IRA Club does not offer appraisal or tax advising services. Please consult a tax advisor to determine the tax consequences and further reporting methods. IRA Club will mail Form 1099-R to you for the tax year in which you take the distribution. IRA Club will send the 1099-R forms by January 31st of the following tax year to the primary address on your account for the tax year in which you take the distribution.

1. ACCOUNT OWNER INFORMATION

FULL NAME	IRA CLUB ACCOUNT NUMBER
LAST 4 OF SSN	PHONE NUMBER

2. DISTRIBUTION TYPE

Do not use this form to transfer funds to another firm. Select one distribution type below.

- | | |
|--|---|
| <input type="checkbox"/> Normal Distribution (over 59 ½) | <input type="checkbox"/> Account Termination |
| <input type="checkbox"/> Early Distribution (under 59 ½) | <input type="checkbox"/> Divorce Distribution |
| <input type="checkbox"/> Return of Contribution for Tax Year _____ | <input type="checkbox"/> Beneficiary / Death Distribution |

3. DISTRIBUTION OF ASSETS

All accounts must maintain a minimum balance of \$500.00. If you are terminating your account, check the second box.

- | | |
|---|---|
| <input type="checkbox"/> Distribute ONLY the Assets Below | <input type="checkbox"/> Distribute and Close the Account
*Termination fees apply. |
|---|---|

ASSET	TOTAL APPRAISED VALUE \$	NUMBER OF UNITS	PRICE PER SHARE
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4. FEDERAL & STATE TAX WITHHOLDING

Asset distributions from your IRA Club account may be subject to federal and state income tax withholding. It is your responsibility to determine the estimated tax you will owe from this distribution should it apply.

INITIAL HERE

5. DOCUMENT FORWARDING INSTRUCTIONS

- via Email
 via Regular Mail
 via FedEx Overnight (+ cost)

ADDRESS
EMAIL ADDRESS

6. PROCESSING FEES debit from the account automatically. If you would like to have these fees charged to a credit or debit card instead, complete the information below.

CREDIT/DEBIT CARD NUMBER	EXPIRATION DATE & CVV	BILLING ZIP CODE
NAME ON CREDIT CARD		

7. ACKNOWLEDGEMENT AND SIGNATURE

By signing below, you hereby direct IRA Club to process this distribution. You understand that federal and state tax may be due and hereby opt not to have such tax withheld. You understand that IRA Club reports distributions to the IRS on Form1099-R and that IRA Club does not provide tax or legal advice.



ACCOUNT OWNER'S SIGNATURE	DATE SIGNED