



Mail or FAX completed forms to:
PO Box 2569, Omaha, NE 68103
Fax: 866-812-3144

Questions? Call us at 1-800-HRBLOCK

Account Owner	
Name (Print Clearly) <input type="text"/> <input type="text"/>	Contact Phone Numbers: <input type="text"/> - <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> - <input type="text"/>
Account Number: <input type="text"/> <input type="text"/>	SSN/TIN: <input type="text"/> - <input type="text"/> - <input type="text"/> <input type="text"/>

Payment Instructions
<p>Required: Distribution Amount</p> <p><input type="checkbox"/> All (account closure will result in a \$25 termination fee)</p> <p>OR</p> <p><input type="checkbox"/> \$ <input type="text"/><input type="text"/>, <input type="text"/><input type="text"/><input type="text"/> . <input type="text"/><input type="text"/></p> <p>(If amount is not selected a full balance distribution will be processed. If the amount requested is greater than the account balance at time of request, an amount equal to the balance will be paid out minus a \$25 termination fee)</p>

Method of Payment
<p><input type="checkbox"/> Mail Check via regular mail to the following address</p> <p>Street (Print Clearly) <input type="text"/> <input type="text"/></p> <p>City, State and Zip <input type="text"/> <input type="text"/></p> <p><input type="checkbox"/> Create a one time ACH to be deposited into my checking or savings account</p> <p>Acct# (Print Clearly) <input type="text"/> <input type="text"/></p> <p>Routing (RTN) # <input type="text"/> <input type="text"/></p>

Withholding Election (Not applicable to Roth IRAs)
<p><input type="checkbox"/> Age 59 <input type="checkbox"/> or Older (referred to as Normal for Traditional IRA)</p> <p><input type="checkbox"/> I elect to have 10 percent Federal income tax withheld from my IRA distribution.</p> <p><input type="checkbox"/> I elect to have a rate of _____ % withheld from my IRA distribution.</p>

<p>Required</p> <p>X</p> <p>_____</p> <p>Account Owner Signature Date</p>
