DEFINITIONS AND USAGE OF FORMS

Retirement Account Forms

Distribution Request Form
Make distributions from your IRA account(s).

IRA Transfer Request Form
Transfer or directly roll over all or a portion of your current IRA, qualified plan or 403(b) Plan to an IRA.

Federal Income Tax Withholding Notice
Elect whether to have Federal income tax withholding to apply to certain distribution(s) for your IRA or Qualified Retirement Plan.

Inherited IRA Beneficiary Distribution Request Form
Complete this form if the Inherited IRA owner is deceased and the beneficiary is requesting a distribution. An IRA Application must also be completed to establish a new Inherited IRA.

Inherited IRA Distribution Request Form
Complete this form to request a distribution or set up a distribution schedule from your Inherited IRA.

IRA Beneficiary Distribution Request Form
Complete this form if you are an IRA beneficiary to take a distribution or to establish an Inherited IRA. An IRA Application must also be completed to establish an Inherited IRA.

IRA Checkwriting Privilege Addition Form
Use this form to add the Checkwriting Privilege to an IRA only.

IRA Shareholder Services Form
Use this form to add or change the Automatic Asset Builder, Checkwriting or TeleTransfer purchase privilege to your individual retirement account.

Required Minimum Distribution Request Form
Request your required minimum distribution from your IRA account.

Individual Retirement Account Beneficiary Designation Form
Establish or change the primary and secondary beneficiary(ies) on your IRA account.