



BNY MELLON



## INHERITED IRA DISTRIBUTION REQUEST FORM

Please complete this form to request a distribution from your Inherited IRA or to set up a distribution schedule for your Inherited IRA. If you have any questions about this form, please call us toll free at 1-800-645-6561.

**Please mail this completed form to:**

Dreyfus Shareholder Services  
P.O. Box 9879, Providence, RI 02940-8079

**For registered, certified or overnight mail, mail to:**

Dreyfus Shareholder Services  
4400 Computer Drive, Westborough, MA 01581

**SECTION 1 – SHAREHOLDER AND DECEDENT INFORMATION**

INHERITED IRA OWNER’S NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY

STATE

ZIP CODE

DAYTIME TELEPHONE NUMBER: \_\_\_\_\_

EVENING TELEPHONE NUMBER: \_\_\_\_\_

SOCIAL SECURITY NUMBER: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

DATE OF DEATH: \_\_\_\_\_

(Original IRA Owner)

IRA TYPE:  Inherited Traditional IRA  Inherited Roth IRA

RELATIONSHIP TO DECEASED IRA OWNER:  Spouse  Non Spouse

**SECTION 2 – DISTRIBUTION OPTIONS - Select applicable option below**

A.  One Time or Lump Sum Distribution Request

If you are taking a one-time distribution from your Inherited IRA, indicate the fund name, fund account number and amount below.

Fund Name \_\_\_\_\_

Fund Account # \_\_\_\_\_ \$ \_\_\_\_\_ **or,**  Entire Balance

Fund Name \_\_\_\_\_

Fund Account # \_\_\_\_\_ \$ \_\_\_\_\_ **or,**  Entire Balance

Fund Name \_\_\_\_\_

Fund Account # \_\_\_\_\_ \$ \_\_\_\_\_ **or,**  Entire Balance



I want my distribution(s) sent by Automated Clearing House (ACH) to my bank. Attach a voided check from your bank account. **A Medallion Signature Guarantee\* is required if the bank account is not Individually registered to you.** Money will be transferred only to the bank account indicated on the voided check. Upon receipt of this form, Dreyfus Transfer, Inc. (the "Transfer Agent") is authorized to credit my bank account using the ACH option. I understand that these services are governed by the prospectus provisions and the rules of the ACH. I further understand that the option may be terminated or modified at any time without notice by Dreyfus or the Transfer Agent.

PLEASE ATTACH VOIDED CHECK HERE.

or

I want my distribution(s) sent by Wire to my bank. Attach a voided check from your bank account. **A Medallion Signature Guarantee\* is required if the bank account is not Individually registered to you.** Money will be transferred only to the bank account indicated on the voided check. Upon receipt of this form, Dreyfus Transfer, Inc. (the "Transfer Agent") is authorized to credit my bank account using the Wire option. I understand that these services are governed by the prospectus provisions and the rules of Wires. I further understand that the option may be terminated or modified at any time without notice by Dreyfus or the Transfer Agent.

#### SECTION 5 – FEDERAL INCOME TAX WITHHOLDING ELECTION - Inherited Traditional IRA ONLY

The Bank of New York Mellon is required to withhold 10% of your distribution for federal income tax purposes unless you elect otherwise. If you elect not to have withholding apply to your distribution, or if you do not have enough federal income tax withheld from your distribution, you may be responsible for payment of estimated tax. You may incur penalties under the estimated tax rules if your withholding and estimated tax payments are not sufficient.

- I want income tax withheld and understand that withholding will be applied at the rate of 10% unless a different withholding percentage is specified \_\_\_\_\_% (minimum of 10%). DOES NOT APPLY TO ROTH IRAs.
- I **do not** want any income tax withheld.

#### SECTION 6. STATE INCOME TAX WITHHOLDING ELECTION - Inherited Traditional IRA ONLY

Depending on your state of residency, state income tax withholding may be required from your distribution. If applicable, you may elect a withholding rate that is above your state's minimum withholding rate. Certain states may permit you to elect to not have withholding apply. If a minimum withholding rate is required by your state, the custodian will withhold applicable state taxes regardless of your election below. The custodian does not withhold state taxes for all states. To the extent permitted by applicable state law, an election to not have Federal income tax withheld will also apply to state income taxes. To review the impact of state withholding for your state of residence, please speak to your tax consultant.

- I **do** want state income tax withholding applied to my Inherited Traditional IRA distribution at a rate of \_\_\_\_\_ %.
- I **do not** want state income tax withholding applied to my Inherited Traditional IRA distribution.

**SECTION 7 – SIGNATURE**

**Taxpayer Identification Number Certification:** Under the penalties of perjury, I certify that [1] the Social Security Number(s) or Taxpayer Identification Number(s) shown in Section 1 of this application is my correct Taxpayer Identification Number(s), [2] I am not subject to backup withholding either because: (a) I am exempt from backup withholding, or (b) I have not been notified that I am subject to backup withholding as a result of a failure to report all dividends, or the Internal Revenue Service (IRS) has notified me that I am no longer subject to backup withholding, [3] I am a U.S. person (including a U.S. resident alien) and [4] the Foreign Account Tax Compliance Act (FATCA) code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is (are) correct. If you are exempt from FATCA reporting (if you are unsure, consult your tax advisor or the IRS), enter your exemption from FATCA reporting code (if any) here:

\_\_\_\_\_. NOTE: Strike out item [2] if you have been notified that you are subject to backup withholding by the IRS and you have not received a notice from the IRS advising you that backup withholding has been terminated.

The IRS does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

**X**

Shareholder Signature

Capacity

Date

Print Name

**Medallion Signature Guarantee\*** (Only required in certain cases. Please review your form, and the instructions, carefully to determine if a **Medallion Signature Guarantee** is needed. **Please note:** Notarization by a Notary Public is not an acceptable guarantee.)

**\*MEDALLION SIGNATURE GUARANTEE REQUIREMENT:**

Dreyfus Transfer, Inc. (Transfer Agent) has adopted standards and procedures pursuant to which Medallion Signature Guarantees in proper form generally will be accepted from domestic banks, brokers, dealers, credit unions, national securities exchanges, registered securities associations, clearing agencies and savings associations participating in the New York Stock Exchange Medallion Signature Program (MSP), the Securities Transfer Agents Medallion Program (STAMP) and the Stock Exchanges Medallion Program (SEMP). Notarization by a Notary Public is not an acceptable guarantee.