

Important: Be sure you understand the Required Minimum Distribution (RMD) rules. Your employer or financial professional can provide more information.

1 Plan and participant information

Please type or print clearly.

Plan name _____ Plan ID number _____

First name of participant (print) _____ MI _____ Last _____

SSN (provide the last four digits) - -

Address of participant _____ City _____ State _____ ZIP _____

Citizenship: U.S. citizen U.S. resident alien Nonresident alien (Submit an IRS Form W-8BEN.)

2 Required Minimum Distribution

If you wish to withdraw more than your RMD, you must complete a separate withdrawal request form. Contact your employer to obtain the appropriate distribution form. Distribution amounts are taken proportionately from all investment options in applicable contribution types.

If you elect a one-time payment, you must submit a withdrawal form each year for your required minimum distribution. No payments will be sent to you automatically and you will not receive an annual reminder from American Funds.

Select either A or B:

A. American Funds to calculate RMD

Select option 1 or 2 below.

1. One-time payment

Calculation method: IRS Uniform Lifetime Table
 IRS Joint Life and Last Survivor Expectancy Table (Select only if your spouse is your sole beneficiary and is more than 10 years younger.) _____
Spouse date of birth (mm/dd/yyyy)

Note: American Funds calculates your RMD using the prior year's December 31 balance of plan assets held on our recordkeeping system. If plan assets were held outside of our recordkeeping system, provide the December 31 balance of those assets:

\$ _____

2. Automated RMD payments (Payments continue until no money is left in account or participant revokes election. Contact your employer to verify if your plan allows this payment method. The automated election applies only to RMDs for current and future years.)

Start date: The first payment should be processed _____
(mm/dd/yyyy)

Frequency: Monthly Quarterly Semiannually Annually

Calculation method: IRS Uniform Lifetime Table
 IRS Joint Life and Last Survivor Expectancy Table (Select only if your spouse is your sole beneficiary and is more than 10 years younger.) _____
Spouse date of birth (mm/dd/yyyy)

B. Calculate your own RMD (One-time payment)

Total gross (pre-withholding) RMD amount requested in a single payment: \$ _____

First name of participant _____ MI _____ Last _____ Plan ID number _____

3 Roth payment instructions

If your account does not contain Roth assets, proceed to Section 4. If applicable, indicate how you wish to have the RMD amount taken from your Roth account. If no box is checked and your account holds Roth funds, the RMD will be processed proportionately across your entire account balance.

I have funds in a Roth money source and wish to deplete my:

Roth funds first **OR** Non-Roth funds first

4 Delivery instructions

Select either A or B. If no selection is made, a distribution check will be sent via regular mail.

- A. Send the distribution electronically (via ACH) to the bank information provided in Section 5. (Distribution payments will be delivered to your bank within three (3) business days following the transaction.)
- B. Mail a check directly to me at the address of record.

5 Bank information — Complete only if requesting electronic deposit

Electronic distributions can only be made to a U.S. bank checking account.

Attach an unsigned, voided check below. The check you attach must be preprinted with the bank name and registration, routing number and account number. Please **do not** staple.

Note: The participant's name **MUST** be included in the bank registration to process the request electronically. If the participant's name is not included, a physical check will be generated instead.

Tape your check here.

John Doe

DATE _____

Bank account registration

PAY TO THE ORDER OF _____

\$ _____

DOLLARS

Anytown Bank

← **Bank name**

| : 999999999 | :

0000000000 | :

Bank routing number

Bank account number

Note: In lieu of a voided check, you may submit a letter from your bank on the bank's letterhead providing the:

- bank account registration
- routing number
- account number
- signature of an authorized signer for the bank

