

If you are planning on filling out the document on your computer, you'll need to download the following Adobe program <https://get.adobe.com/reader/>. **Do not open the document in preview or any similar programs as it will not be filled out correctly.**

Please read very carefully and follow the instructions to the best of your ability. Reach out to us with any questions you may have. If the document is not filled out properly, our custodian Apex will not accept the document and we will need you to fill it out again.

1. **ACCOUNT TYPE:** Check the **Traditional IRA** box
2. **ACCOUNT HOLDER'S INFORMATION:** add your name, account number, SSN & date of birth
  - a. Your account number can be found in your account statements or trade confirmations for your IRA account.
3. **BENEFICIARY (OR FORMER SPOUSE) INFORMATION:** Make sure under *Name* it states **N/A**;
  - a. **\*DO NOT FILL IN ANY OTHER INFORMATION IN THIS SECTION\***
4. **TYPE OF DISTRIBUTION:**
  - a. **Normal:** If you are over 59½ years old
  - b. **Premature:** If you are under 59 ½ years old
  - c. **Revocation:** If you are withdrawing still within 7 days of opening the account
5. Where it says **Excess Contribution Removed Before Excess Removal Deadline & Recharacterizations:** leave this section blank
6. Under **TYPE OF DISTRIBUTION:** Check **One-time distribution** and fill in the amount you wish to withdraw.
  - a. If you are closing the account select **Total Account Distribution**
7. For **TAX WITHHOLDING ELECTION:** Check off the correct option for both federal and state withholding options
  - a. ***\*Important: If you are withdrawing from a Traditional IRA account you must review the mandatory minimum tax withholding information seen here: [IRA Close or Withdrawal State IRA Withholding Requirements](#). If you do not follow these regulations, your transfer could be rejected.***
    - i. Enter an amount for Federal Withholding
    - ii. Enter an amount for State Withholding
8. **DELIVERY INSTRUCTIONS:** Check **Special Payment Instructions** and write in:
  - a. **ACH On File:** When transferring to you linked external bank account
  - b. **Address on Record:** When there is no bank account on file
  - c. **\*DO NOT FILL IN ANY OTHER INFORMATION IN THIS SECTION\***
9. **SIGNATURE:** Sign and date the line for **IRA Holder or Beneficiary**  
**Nothing further is needed from you on the form.** Scan or take a picture and reply back to this email with your document attached.