

DISTRIBUTION REQUEST FORM

PART 1: ACCOUNT OWNER INFORMATION

E u (First/MI/Last) _____
 u } o } CE •• _____
 } μ v } μ u } CE _____
 W Z } v _____ ^ μ (() } AE _____

PART 2: IRA h ^ d K / E

Name: SPECIALIZED TRUST MEANY
 Address: P.O.Box 3587 Albuquerque NM 87190
 Physical Address: 6100 Indian School NE Suite 215
 Albuquerque, NM 87110
 Z o % } / Z ^ d X } u

K h e d d z W : (Select one) PROCESSING OPTION (Select one)

- d CE } š } } v o / Z Z } š Z / Z Standard Express Wrocessing (Fee) E AE š } W CE } •• } M R W o } š } Specialized Black

PART 3: BENEFICIARY OR FORMER SPOUSE INFORMATION

This section should only be completed by a beneficiary taking a death withdrawal or a former spouse taking a withdrawal as a result of a court approved property settlement due to divorce or legal separation.

E u (First/MI/Last) _____
 d AE (SSN/TIN) _____
 š } () CE š Z _____ W Z } v _____

CE } v } i _____
 CE } v } i _____
] š } Ç | ^ š } š } | • / W _____

PART 4: WITHDRAWAL INSTRUCTION

d } š t } š Z CE Á o _____
 u } μ v } š } š Z CE Á š o _____

d Z } • t } š Z CE Á o t } o o } • d Z } • / Z

WITHDRAWAL REASON (Select one)

- í X d CE v } š } CE š Z / Z
 í X E } CE u } š Z CE (Age 59½ or older)
 í X CE t } š Z CE (Under age 59½) (Select a, b, if applicable)
 X } • } o } š } Ç
 X } CE } v } Á CE š } } Z } š Z Z } μ • š v } } p o o
 W CE } W } Ç u } v } CE u } Z Á Ç
 X / D W / z t } š Z CE } š } z & } CE } š } z (No IRS
 penalty exception)

ð X } š Z } š Z CE Á } o v () } } CE Ç
 ñ X } CE Z } o o } š } CE o } P } w } o } Ç CE } CE } } š } CE } W } v } š v

ò X v CE } Z } d } CE • } š v
 ó X AE } v } š CE } μ } š } } v } Á () CE } AE } z } u } Á o o } v
 (Enter the net income attributable to the excess and select a or b)

E } v } u } š } CE } μ } š } o _____
 X AE } • • } v } š CE } μ } š Z u } Á } v } š Z ^ u z CE
 X AE } • • } v } š CE } μ } š v z CE } Z u } Á } v } š ZE AE } š CE

ò X AE } • • } v } š CE } μ } š } } v } Á (š } š Z AE } z } u } Á o o } v

ò X Z CE } š } CE } í } t } h } e } t } h } e } net income attributable to the
 recharacterized amount and select a or b)
 E } v } u } š } CE } μ } š } o _____

X ^ u r z Z CE Z CE } š } CE } í } š } } v
 X v CE } } Z r z CE } š } CE } í } š } } v

í X Z Á } š } } v Z P μ o } v } CE } μ } š } } v
 CE } v } v } P • _____

í X Z Á } š } } v Z o o } Á } CE } v } • } CE } v } v } š } CE } μ } š } } v

í X Y μ o } () } CE } š Z } CE } % } š } } v } • } š } CE } μ } š } } v

PART 5: WITHHOLDING ELECTION

Do not complete this section for a transfer, recharacterization, or direct rollover to an eligible employer-sponsored retirement plan, or if you are a nonresident alien.

Your withholding election will remain in effect for any subsequent withdrawal unless you change or revoke the election.

FEDERAL WITHHOLDING (Select one)

t } š Z Z } o _____ 9 (Must be 10% or greater)

t } š Z Z } o } š } } v o & / v CE } u o d } AE _____

(If applicable)

} E } š t } š Z Z } o & CE } o / v } u d AE _____

PART 6: WITHDRAWAL ^ μ u u CE Ç

This section may be completed for informational purposes only.

' CE } t } š Z CE Á } q } v } š _____
 & CE } š Z Z } o } u } μ } v } š _____
 E } š } š Z CE Á o u } μ } v } š _____

Note: The gross withdrawal amount is the amount after any penalties and fees assessed by the trustee or custodian.

PART 7: WITHDRAWAL INSTRUCTIONS

ASSET HANDLING Assets identified below will be liquidated immediately unless otherwise specified in the Special Instructions section).

Table with 3 columns: Asset Description, Amount to be Withdrawn, Special Instructions

PAYMENT METHOD

Check (If the withdrawal reason is transfer to another IRA, direct conversion to a Roth IRA, or direct rollover to an eligible employer-sponsored retirement plan, the check must be made payable to the receiving organization).

Direct Payment (Formal text describing direct payment instructions)

External Account (Wire Transfers Only) (Additional documentation may be required and fees may apply.)

Wire Transfer Instructions (Formal text describing wire transfer details)

PART 8 SIGNATURES

Signature Line 1 (Formal text for signature and date)

Signature Line 2 (Formal text for signature and date)

WITHHOLDING NOTICE INFORMATION

Basic Information About Withholding From Pensions and Annuities. (Formal text describing withholding rules)

Purpose of Form W-4P. (Formal text describing the purpose of the form)

Nonperiodic Payments. (Formal text describing nonperiodic payment rules)

Payments Delivered Outside of the U.S. (Formal text describing foreign payment rules)

Withholding of Tax on Nonresident Aliens and Foreign Entities. (Formal text describing tax withholding for nonresidents)

Revoking the Exemption From Withholding. (Formal text describing how to revoke an exemption)

Statement of Income Tax Withheld From Your IRA. (Formal text describing the statement of tax withheld)

REPORTING INFORMATION APPLICABLE TO TRADITIONAL IRA AND SIMPLE IRA WITHDRAWALS

z}μ u μ •š • μ % % o Ç o o CE (μ • š] v () CE u š] v () CE š Z Á] š Z CE Á o • } š Z š CE μ • š } CE μ • š] v (Ç) μ Z À v Ç (μ • š] v • CE P CE] v P Á] š Z CE Á o U % o CE CE v • μ CE šš } / Z U • μ • š v š] o o Ç (μ o % CE]] % Ç ur Z š • U] v P CE X / Z ^ o À Ç CE CE % } CE š Z Á] š Z CE Á o or Z] v P CE Á] š Z CE Á o • ~] v o μ] v P CE (μ] CE u] v u í i ò ě μ •] v P } ó X

WITHDRAWAL REASON

/Z •• š• v Á] š Z CE Á v š v Ç š] u X D } • š / Z Á] š Z CE Á o • CE CE % } CE š š Z šš š ů • š / Z ^ X μ / Z ^ š] CE % } CE š Z Á] š Z CE Á o or Z] v P CE Á] š Z CE Á o • ~] v o μ] v P CE (μ] CE u] v u í i ò ě μ •] v P } ó X

Transfer to Another IRA. d CE v • (CE • u Ç u Ç v / Z } Á v CE U v (]] CE Ç U } CE () CE u CE • % } μ • μ v CE CE % } CE š } v & Z] CE u í i ò ě r

Normal Withdrawal (Age 59½ or older) (Ç) μ CE P ñ ò * } CE } o CE U Á] š Z CE Á o • ~] v o μ] v P CE (μ] CE u] v u í i ò ě μ •] v P } ó X

Early Withdrawal (Under age 59½) (Ç) μ CE μ v CE P ñ ò * U Á] š Z CE Á o • () CE v Ç CE • } v v } ů q] v P } o } X

- Disability. / (Ç) μ CE μ v CE P ñ ò * v] • o U Á] š Z CE Á Z o μ • } CE CE % } CE š } v & } CE u í i ò ě
- Direct Conversion to a Roth IRA, Substantially Equal Periodic Payments, or IRS Levy. / (Ç) μ CE μ v CE P ñ ò * U Á] š Z CE Á v Á CE • } v • š } Z } š Z / Z U • μ • š v š] o o Ç (μ o % CE]] % Ç ur Z š • U] v P CE X / Z ^ o À Ç CE CE % }
- SIMPLE IRA Withdrawal in the First Two Years (No IRS penalty exception) (Ç) μ CE μ v CE P ñ ò * v o • • š Z v š Á] Ç š Z () CE • š } v š CE] μ š] v š } Ç) μ CE ^ / DW > / Z U Á] š Z μ CE] v P ó X CE CE % } CE š } v & } CE u í i ò ě

Death Withdrawal by a Beneficiary. t] š Z CE Á o • Ç v (]] CE] • () o o } Á] v P š Z š Z } (š Z } CE] v μ o] v P } Á] v P } ó X h • } ' Á] š Z } ò () CE • μ CE Á] Á] v P • % } μ • v (]] CE Ç Á Z } r • % } š • } CE] CE š] CE] o v š Á } CE

Direct Rollover to an Eligible Employer-Sponsored Retirement Plan.] CE š CE } o o } Á CE • š } μ o } μ P] CE CE šš] CE CE • ~ / v š CE v o } ^ š] v ~ / Z ^ X • ò í ~ • ~ X P X U ò í ~ l • U % o CE } (] š • Z CE] v P U u } v Ç % o CE CE šš • CE % o v v } μ] v š Ç o % } ^ X ò í ~ • • U } CE P } Á CE v u v š o (CE CE } u % o v • š] v % o v ~ / Z μ • v P r ' ů ñ ó ~ • • CE CE % } CE š } v & } CE u í i ò ě

Prohibited Transaction. W CE } Z] j š š CE v • š] v • • (] v] v / Z ^ X ò ě ů μ • } v P CE } CE ñ % } CE š } v & } CE u í i ò ě

Excess Contribution Removed Before the Excess Removal Deadline. AE •• } v š CE] μ š] v • CE u } Á () CE š Z AE •• CE o] v U] v o μ] v P AE š v • } v • • u μ • š] v o μ š Z v š] v } u š š CE] μ š o š } š Z AE •• X

- / (Ç) μ CE AE •• } v š CE] μ š] v Á • } v š CE] μ š v CE u } Á] v š Z • u Ç CE U] • () CE % } š Z AE } v & } CE u í i ò ě r] v P } ó X / (Ç) μ CE μ v CE í X P ñ ò * o • } μ • }
- / (Ç) μ CE AE •• } v š CE] μ š] v v Á Ç } CE š CE] μ š u } Á v }] v š Z v AE š Ç CE U () CE š Z AE •• CE u } CE % } CE š } v & } CE u í i ò ě r W X / (Ç) μ CE μ v CE P ñ ò * o • } μ • } í X

Excess Contribution Removed After the Excess Removal Deadline. / (Ç) μ CE AE •• } v š CE] μ š] v] • CE u } Á (š CE š Z Á] š Z CE Á o] • CE % } CE š Z μ } v P } CE u í i ò ě Ç) μ CE μ v CE P ñ ò * } CE } ó] (Ç) μ CE P ñ ò * } CE

Recharacterization. d CE] š] v o / Z } v š CE] μ š] v] v o μ] v P š Z v š] v } u š š CE] μ š o u Ç CE Z CE Ç) μ CE š AE (] o] v P o] v U] v o μ] v P AE š v • } v • X

- Z Z CE š CE š Z š] v P š Z • u Ç (CE CE] š Z } v š CE] μ š] v CE CE % } CE š } CE u í i ò ě μ] v P EX
- Z Z CE š CE š Z š] v P CE š š CE Ç (CE CE] š Z } v š CE] μ š] v CE CE % } CE š } CE u í i ò ě μ] v P ZX

Revocation of a Regular Contribution. Z Á } š]] (CE P μ v P CE] μ š CE v • % } CE & } CE u í i ò ě μ •] v P ó X (Ç) μ CE μ v CE P ñ ò * v CE v P } v š Z } v š CE] μ š] v š CE] μ š • μ • } í X

Revocation of Rollover, Transfer, or SEP Contribution. Z Á } š]] (CE } o o } š CE v • CE U W % o } v š CE] μ š CE v • % } CE & } CE u í i ò ě μ •] v P í] (Ç) μ CE CE ñ ò * } CE } ó] (Ç) μ CE ñ ò * } CE o CE X

^ W } CE ^ / DW > / Z AE •• } v š CE] μ š] v Z AE Á •• h v W CE š Z / DW > Z ^ Z } v š CE] μ š] v • CE u } Á μ v } u % o] v Z • } o μ š] v ^ Ç • š u Ç ~ CE v Z E • % P } CE š CE q • & } CE u í i ò ě r Z μ •] v P } í X