



Easy IRA Distribution Request

for Traditional and Roth IRAs

H&R Block, Attn: Back Office Operations
P.O. Box 2569, Omaha, NE 68103
Fax: 866-812-3144

Questions? Call us at 1-888-687-4722

Account Owner

First Name	Middle Initial	Last Name
SSN:	Phone Number:	Email:
IRA Account Number:		

Payment Instructions

Required: Redemption Amount

ALL (will result in a \$25 termination fee) OR PARTIAL \$, .

An Early Distribution may result in a substantial penalty. If an amount is not selected, a full balance distribution will be processed with a \$25 Termination Fee. If the amount requested is greater than the account balance at time of request, an amount equal to the balance less a \$25 Termination Fee will be paid. If a partial payment is selected and the amount lowers your balance below the \$25 minimum balance rule, a termination fee will be applied and the remaining balance distributed to you.

Method of Payment

Note: Upon receipt of all valid documentation, please allow 5 business days for processing. All delivery times indicated below are after processing.

CHECK

Regular Mail (10-14 days for delivery) **check here for change of address**

Express Mail (\$25 Fee - **P.O. Box NOT allowed**) (2-3 business days for delivery)

Street Address

City, State, Zip Code

DIRECT DEPOSIT (ACH) (3-5 business days for delivery)

REQUIRED: PRE-PRINTED VOIDED CHECK or LETTER ON BANK STATIONERY confirming account title, account number, account type, and routing number. Deposit slips, bank statements, member cards, or starter checks will not be accepted.

Checking Account Savings Account

Name on Bank Account (must match name on IRA)

Bank Account Number _____
Routing Number (9-digits)

Withholding Election

Age 59 ½ or Older (referred to as Normal for Traditional IRA)

I elect to have 10 % Federal income tax withheld from my IRA distribution (by not selecting, you are opting out)

I elect to have Federal income tax at a rate of % withheld from my IRA distribution (must be greater than 10%)

Note: IRS regulations require that 10% federal tax withholding be taken from your distribution. We encourage you to consult your accountant or tax advisor regarding your IRA distribution. By not indicating a withholding election above then you are choosing to opt out of withholding. If you elect not to have federal income tax withheld, you are liable for payment of federal income tax on the taxable portion of your distribution. You may be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding are not adequate. **Important State tax withholding information:** We will withhold state tax in accordance with the respective state's rules if, at the time of distribution, your address of record is within a mandatory withholding state and you have federal income tax withheld.

Signature (required)

H&R Block is not liable for problems or delays caused by inaccurate or incomplete information provided by you on this IRA Distribution form. Accordingly, we ask that you review the form again to ensure that it contains accurate information for your IRA Distribution request.

X. _____
Account Owner Signature Date