

Reissue IRA to Beneficiary Distribution Form

This form is being provided to complete your request to change the distribution payee. Please review the information on this form, complete sections A, B, and C and sign your request below under section D.

Please sign and mail form to:

BNYM Closed Fund Distribution
c/o SS&C GIDS, Inc.
PO Box 219957
Kansas City, MO 64121-9957

A. Decedent's Information:

Name (First, M.I., Last) Social Security Number Check # received

Marital Status: Single Married: Spouse's name _____

B. Beneficiary Information:

Beneficiary %: _____ State of Residence: _____

Name (First, M.I., Last) / / - - -
Date of Birth Social Security Number

Street Address (Physical Address) APT # City State ZIP

C. INSTRUCTIONS FOR ISSUING CHECK

Spousal Beneficiary ONLY:

- Issue a check in my name. I understand that there is no tax withholding option available on this distribution. Depending on my state of residency, I may be subject to federal and state tax on the taxable portion of my distribution.
- Issue a check payable to my IRA, qualified retirement plan, 403(a), 403(b), or 457 Plan as follows:

Non-spousal Beneficiary:

- Issue a check in my name. I understand that there is no tax withholding option available on this distribution. Depending on my state of residency, I may be subject to federal and state tax on the taxable portion of my distribution.
- Issue a check payable to my §408(d)(3)(c) Inherited IRA as follows: _____

D. SIGNATURE – I am a beneficiary authorized to receive this distribution. I understand that I will not receive IRS Form 1099-R. If I have any questions regarding my tax consequences, I will consult with my financial advisor or tax professional prior to cashing this check to determine the appropriate tax treatment for my particular situation. I hereby affirm that the information given is true and correct, and authorize SS&C GIDS, Inc. to make the distribution according to the instructions on this form.

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct social security number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. person (including a U.S. resident alien).

You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

Signature of Beneficiary

Printed Name

Date