



**SAFE-HARBOR-IRA® DISTRIBUTION REQUEST FORM**

**THIS FORM MUST BE NOTARIZED**

**IRA Owner Information**

Name: \_\_\_\_\_ Account Number: \_\_\_\_\_

**FOR OFFICE USE ONLY**

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

**Reason for Distribution**

- Premature Distribution.** I am not yet age 59½, nor am I disabled. I understand that a **10% tax penalty** will be assessed on the amount of the distribution.
- Normal Distribution.** I am at least age 59½.
- Death.** Please attach a certified copy of the death certificate. If the beneficiary is the IRA owner's spouse, he/she may rollover this distribution into their own Centier Bank IRA. Please initial here if you want new account forms sent to you. \_\_\_\_\_

**Payment Instructions**

**1. Payment Amount**

- A gross distribution of entire account balance.
- Partial gross distribution of \$ \_\_\_\_\_ .

**2. Payment Method**

- Mail a check to my address of record.
- Deposit to my: (If type of account is not marked, we will default to checking.)
  - Checking Account **(Please provide a voided check)**     Savings Account

Bank Name \_\_\_\_\_

Bank Address \_\_\_\_\_

ABA Routing # \_\_\_\_\_

Account # \_\_\_\_\_

**Continued on back.**

### 3. Federal Income Tax Withholding

NOTE: If no selection is made, we are required to withhold 10% from your distribution. Federal regulations require us to provide notice regarding the withholding elections on your distribution. These can be found in the disclosure statement received when claiming your account.

- I do not want Federal Income Tax withheld from this distribution.
- Withhold 10% Federal Income Taxes from this distribution.
- Withhold \_\_\_\_\_ % or \$\_\_\_\_\_ for Federal Income Taxes from this distribution.

### Signature

I certify the accuracy of the information contained on this form, and I authorize the transaction described therein. I acknowledge that Centier Bank has advised me that all distributions I receive from this IRA may be subject to Federal Income Tax withholding, and that I may be liable for payment of Federal Income Taxes on this distribution regardless of whether or not I elected to have taxes withheld. I have been advised to consult a tax professional to discuss any tax consequences relating to this transaction. I hold Centier Bank harmless for all claims that may arise from my actions related to this form.

\_\_\_\_\_  
Signature of IRA Owner or Beneficiary

\_\_\_\_\_  
Date

#### Notary Acknowledgment (to be completed by Notary Public)

STATE OF \_\_\_\_\_ )

) SS:

COUNTY OF \_\_\_\_\_ )

Subscribed and sworn to before me, a Notary Public, this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_

\_\_\_\_\_  
Notary Public

My Commission Expires: \_\_\_\_\_

SEAL: