

**REQUEST FOR MINIMUM REQUIRED DISTRIBUTION**

WDW640

According to our records, you have attained at least the age of 70 ½. The Internal Revenue Code provides that, for the retired participant, a minimum required distribution must be made for the year in which a participant reaches age 70 ½ and for each year thereafter. Based upon your life expectancy and, if applicable, your beneficiary’s life expectancy (as determined by IRS tables), the minimum required distribution amount has been calculated for you. (*Participants who do not take the required minimum distribution in a taxable year are required to pay to the IRS a non-deductible excise tax of 50% of the difference between the required amount and the amount actually distributed.*) The amount that is required to be distributed yet this year is reflected below. Please respond by December 1.

**PERSONAL INFORMATION:**

Name: \_\_\_\_\_ Member No.: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Soc. Sec. No.: \_\_\_\_\_ Telephone No.: \_\_\_\_\_

Marital Status:  Married  Single/Widow(er)/Divorcee  Separated

**WITHDRAWAL INFORMATION (Check one box)**

- I hereby request a withdrawal of \$\_\_\_\_\_ from my account in the Church of God Ministers’ Retirement Plan in order to comply with the Minimum Required Distribution rules.
- I am not presently retired. I choose to delay taking a Minimum Required Distribution until the year I retire. (If delaying a MRD payment, please check this box, sign below and return this form by December 1.)

**TAX WITHHOLDING INFORMATION**

I understand that most withdrawals (exceptions may apply to distributions qualifying as “housing allowance” for ministers) are subject to Federal income tax. I also understand there may be certain state income tax liabilities.

Instructions: If you want Federal Income Tax (20%) withheld from your withdrawal, sign and date this election. Even 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 withdrawal. You also may be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding, if any, are not adequate.

**I ELECT TO HAVE FEDERAL INCOME TAX (20%) WITHHELD FROM MY WITHDRAWAL.**

Signed \_\_\_\_\_ Date \_\_\_\_\_

**DATE AND SIGNATURE (If married, both you and your spouse must sign.)**

Member’s signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse’s signature \_\_\_\_\_ Date \_\_\_\_\_

**SUBSCRIBED AND AFFIRMED TO AND BEFORE ME, BOTH PARTIES SIGNING ABOVE,**

this the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_. \_\_\_\_\_ State \_\_\_\_\_ County \_\_\_\_\_

Notary Public

My commission expires