



The Pension Boards
United Church of Christ, Inc.
WHERE FAITH AND FINANCE INTERSECT

Required Minimum Distribution (RMD) Withdrawal Application

Member ID: _____

PERSONAL INFORMATION

SSN: _____ Date of Birth: _____ Gender: [] M [] F Status: _____

Name of Member (last, first, middle initial): _____ Title: _____

Address: _____ City _____ State _____ ZIP _____

Cell Phone: (____) _____ - _____ Home Phone: (____) _____ - _____ Email: _____

IMPORTANT INFORMATION

Accumulated balance withdrawals between \$500 up to \$24,999 received today by 1:00 pm (ET) will be processed immediately unless you are required to submit additional forms. If your withdrawal is received after 1:00 pm (ET), it will be processed on the next business day unless you are required to submit additional forms. Once the Pension Boards receives the completed forms, your request will be processed accordingly using the most recent unit value. Once the request has been processed, the payment will be made within 3-7 business days.

Accumulated balance withdrawals of \$25,000 or more must be received by 1:00 pm (ET) on the last business day of the month. These will be processed on or by the 10th of the month following receipt of the completed forms (adjusted for weekend and holidays) using the next available unit value. Payment will be made within 48 hours after the processing date (adjusted for weekends and holidays). Requests received after 1:00 pm (ET) on the last business day of the month will be processed on or by the 10th of the second month following receipt of the completed forms using the most recent unit value (adjusted for weekend and holidays). Payment will be made within 48 hours after the processing date (adjusted for weekends and holidays).

TAX WITHHOLDING ELECTION

The standard Required Minimum Distribution (RMD) tax withholding percentage will be 10%. Federal taxes and any mandated state taxes (if applicable) will automatically be withheld from your distribution, unless you indicate a different federal tax withholding percentage below.

[] Please withhold _____% (minimum 10%) from my distribution(s) for federal taxes.

DISTRIBUTION METHOD

Please select ONE:

I would like to have the entire amount of my withdrawal paid to me. I understand that 10% will be withheld and sent to the IRS as an income tax withholding.

I would like to withdraw \$_____ from my account.

I would like to withdraw _____% from my account.

SPOUSAL CONSENT AND NOTARY

Spousal consent and notary are only required if the applicant is married and has chosen an **RMD withdrawal**.

Spouse's Consent:

I hereby consent to the election by my spouse of an RMD withdrawal. I understand that no annuity or reduced benefits will be payable to me.

Spouse's Signature _____ Date: _____

Notary's Signature _____ Date: _____

Notary's Stamp:

SIGNATURE

Member Signature _____ Date: _____
