



Check this box for EXPEDITED PROCESSING (1-2 business days).  
Cost of expedited service is \$50.

Only use this form to request an RMD Asset In-Kind distribution from your account. A Form 1099-R will be issued for all distribution requests.

If your RMD requires a liquidation you should make your request by November 15th, however we can not guarantee that the funds will be received in time for us to process your payment by year end. Please check with your investment provider to determine if they will be able to liquidate and deliver funds by December 1st.

## 1. PERSONAL INFORMATION (\*required field)

Should Forge Trust Co. need to contact you in regards to this request, your preferred method of contact is:

Email

Primary Phone

First Name*	Middle Name	Last Name*
Account Number*	Social Security Number* (last 4 digits)	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email (Your personal email only)	

## 2. TYPE OF DISTRIBUTIONS (please select one)

**IMPORTANT:** To ensure a transaction is processed by year-end, please submit all required paperwork in good order no later than Dec 1st.

Age 72 Required Minimum Distribution (RMD)

### Beneficiary Distribution Options

I do NOT want any distribution taken from this Account	Beneficiary Required Minimum Distribution (indicate amount below)
RMD distribution for tax year: 20 ____ (indicate amount below)	Beneficiary Five Year Full Distribution Election (Distribute the entire account)
Close the account and distribute the full value of the IRA. A Termination fee of \$150 and a re-registration fee may apply.	
No longer available	
Charitable gift donation—applicable if you are 72 years of age or older (Attach notice, coupon, or stub)	Name (payable to)
	Address to send check
	City/State/Zip

## 3. AMOUNT OF DISTRIBUTION (receipt of confirmation could take 60 to 90 days)

Distribute the following assets in-kind:

These assets will be re-registered to your name. If an asset cannot be re-registered, we will send you an Assignment of Interest. A Form 1099-R will be issued, for the value of the asset(s) at the time of re-registration/assignment.

Asset Name	No. of Shares/Units	Asset Values (in \$ amount)

Make my distributions on (MM/DD/YYYY): \_\_\_\_\_

## 4. ACKNOWLEDGMENT & PARTICIPANT SIGNATURE

Investment Products:

- Not FDIC Insured
- No Bank Guarantee
- May Lose Value

As set forth in my Forge Trust Co. Custodial Agreement, I hereby elect and acknowledge the foregoing distribution. I understand that Forge Trust Co. and the Custodian neither assumes nor implies any liability for the failure of my elected distribution to meet any required minimum distribution requirements under the law and that the amount of the distribution is exclusively mine to make.

**Please provide a Property Appraisal Report or Letter of Opinion from a licensed realtor along with three comparable prices. If your LLC has a bank account associated with it you must use the IRA LLC Valuation form. For IRA LLC Valuations you must have your valuation confirmed by an Accountant, Tax Advisor, CPA or other similar individual or entity.**

Account Owner's Signature <b>X</b>	Date (MM/DD/YYYY)
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Please sign and submit additional documents as required.

## DELIVERY INSTRUCTIONS

**Email**  
transfers-out@ForgeTrust.com

**Fax**  
(650) 745-2932

**Regular mail**  
Forge Trust Co.  
PO Box 7080  
San Carlos, CA 94070-7080

**Overnight mail**  
Forge Trust Co.  
1160 Industrial Road, Suite 1  
San Carlos, CA 94070-4128