

Brokerage IRA Distribution



Use this form to request a distribution from your Traditional, Roth, Rollover, SIMPLE or SEP IRA.

Complete a separate form for each type of IRA from which you wish to take a distribution.

Please print clearly in CAPITAL letters using black ink and sign on page 4.

1 Provide Your Ownership Information

If a new account, please leave blank.

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Owner's account number

Mr. / Mrs. / Ms. Owner's first name

Middle initial

Owner's last name

Owner's U.S. Social Security number

Telephone number (daytime)

Owner's state of residence

2 Choose the Reason for Your Distribution

If you are taking a distribution from your IRA, it will be reported to the IRS as normal or premature based on your age at the time of the distribution¹, unless you check one of the exceptions below.

Please choose one.

- Distribution due to death of original IRA owner:** Benefit payment to beneficiary (excludes a surviving spouse who elects to treat the IRA as his or her own)
- Direct Rollover to Qualified Retirement Plan²:** The distribution is being directly rolled into a qualified retirement plan with your employer (You must provide proof that your plan accepts rollover monies such as a completed copy of the plan enrollment form or letter of acceptance from the plan. **If you are requesting a direct rollover to a qualified retirement plan, please note that the signature guarantee requirement described in step 7 does not apply. However, a completed copy of the plan enrollment form or letter of acceptance from the plan is required.**)
- Excess Contribution²**

\$

Amount of Excess Contribution

Income Attributable to Excess Amount

Month-day-year

Tax year

¹ Distributions from Beneficiary IRAs will be reported as death distributions, regardless of age.

² Not available for periodic distribution.

3 Provide Your Distribution Instructions

Select one of the three distribution options below and how you would like us to pay the distribution. The check will be made payable to you and mailed to your address of record unless you request otherwise in step 4. Transfers from an IRA to a non-IRA and redemptions from an IRA may result in a taxable event.

A Total Distributions (for complete liquidation of your IRA)

To liquidate and send cash, securities must be sold prior to submitting this form. Securities may be sold by logging in to your account at americancentury.com, calling us at 1-888-345-2071, or on our automated phone system at 1-888-345-2091. Please note this may be a taxable event.

A \$50 termination fee applies to total distributions from your IRA. If applicable, a \$50 custodial fee will be applied for accounts below \$10,000. Applicable fees will be deducted from the account balance at the time of distribution. You may call us to find out if the custodial fee applies to your account.

B One-Time Distribution

Payment in the amount of \$ _____

In-kind distribution of securities to the following non-retirement American Century Investments® brokerage account:

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Name of Security

Quantity of shares

Name of Security

Quantity of shares

C Periodic Distribution (available only if you are 59½ or older)

Select one: New request Change of instructions

Automatically recalculate and redeem my Required Minimum Distribution (RMD)
(You are age 70½ or older.)

Selecting this option will create scheduled instructions for your annual RMD amount. Federal income tax law generally requires that IRA owners start RMDs beginning the year the IRA owner reaches the age of 70½ (Roth IRAs are excluded from this requirement).

Note: Last Business Day of the Year Processing. If your account has active scheduled RMD instructions, and the account's RMD obligation for the year has not been met by the last day of the year, a "supplemental" distribution (up to the available cash in your account) will occur in order to meet the RMD amount. For this purpose, we will add all scheduled and one-time distributions taken during the year when determining if the RMD has been met. Any changes that affect your calculation-factor and/or the fair market value of the IRA for the previous year may affect the calculation of your RMD amount.

Fixed payment in the amount of \$ _____

Payment frequency (check one): Monthly Quarterly Semiannually Annually

Start date (month-day-year)

End date, optional (month-day-year)

4 Select Your Payment Method

Select one payment method listed below. If you want your distribution check made payable to someone other than you and/or mailed to an address other than your address, please provide the information requested below. **A signature guarantee is required to send a check payable to a third party or charity. A signature guarantee also is required for checks over \$100,000. See step 7 for additional information about signature guarantees.**

A Distribute to Another American Century Investments Account

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OR

American Century Investments brokerage account number

American Century Investments mutual fund account number

B Electronic Payment to Your Financial Institution

A one-time distribution, paid by ACH or wire, will be sent to your bank account. This service is available only if you have preauthorized us to send your redemptions electronically to a financial institution. If you would like to set up this service for future use, you must complete a *Brokerage Investment and Redemption Form* available on our website or call us at 1-888-345-2071 to request one. A wire fee applies and will be deducted separately unless it is a total distribution and then it will be deducted from the total distribution amount. A signature guarantee is required in step 7 for amounts over \$100,000.

C Send a Check (choose one below)

To my address of record.

To an alternate address and/or payable to a third party (provide the name and address below).

Third Party's or Charity's name

Third Party's or Charity's address

Apartment/Unit/PMB

City

State

ZIP

5 Complete Your Withholding Election – Form W-4P (OMB No. 1545-0415)

Notice of Withholding (Excludes Roth IRAs)

If you have not been issued a U.S. Social Security number, or you have been issued a U.S. Social Security number but the address on your account is outside the United States, please call American Century Investments before completing this form.

The amounts you receive from your IRA are subject to federal income tax withholding. You may elect to have withholding apply to your payments by checking the box below and indicating the rate of withholding.

If you do NOT want us to withhold federal income tax from your payments, do NOT check the box.

I elect to have federal income tax withheld at the rate of _____%. (Percentage must be between 10-100%. If no percentage is indicated, or if you indicated a percentage of 1-9%, withholding will be made at the rate of 10%.) Note: State tax will be withheld according to state regulations if, at the time of your distribution, your tax residency is within one of the mandatory withholding states.

Remember, even if you elect not to have income tax withheld, you are liable for paying income tax on the taxable portion of your withdrawal. If you elect not to have income tax withheld, or you don't have enough income tax withheld, you may be responsible for payment of estimated tax. You may incur penalties under the estimated tax rules if your withholding and estimated tax payments are not sufficient.

For automatic periodic distributions only, you have the right to revoke your withholding election at any time, and any election you make will remain in effect until revoked by filing a new election.

6 Sign Your Name and Date Below

- In consideration of American Century Brokerage, its employees or agents providing the services established on this form, I agree to defend, hold harmless and indemnify American Century Brokerage, its officers, agents, employees, affiliates and successors from all losses, claims, expenses and liabilities that any of them may suffer arising from, or as a result of, American Century Brokerage's acceptance of transaction instructions through these services.
- I understand that neither American Century Brokerage nor any affiliated companies shall be responsible or liable for any damages related to online services including, but not limited to, those caused by theft, unauthorized access, failure of electronic or mechanical equipment, communications line failure, telephone or interconnectivity problems, or other occurrences beyond their control.



Signature

Date

7 Obtain Signature Guarantee

If you are requesting a distribution be sent to an alternate name or mailing address, or your distribution is more than \$100,000, we require a signature guarantee. The signature on this form must correspond with the name on your IRA.

Each signature must be guaranteed by a participant in a Securities Transfer Association Signature Guarantee Program. Many domestic banks, trust companies, credit unions, brokers, dealers, national securities exchanges, registered securities associations, clearing agencies and savings associations participate in such programs. Each guarantee must be an original ink stamp that states "Signature Guaranteed/Medallion Guaranteed" and must be signed on behalf of the guarantor by an authorized person.

Note: Acknowledgment of signature by a notary public is NOT acceptable.

Please affix signature guarantee ink stamp below with appropriate signature, title of officer and date.