

IRA Direct Rollover to QRP



Complete this form to request a direct rollover from your American Century Investments® Traditional, Rollover, SEP, SARSEP or SIMPLE IRA to a qualified retirement plan (QRP) held at another financial institution. Please note that Roth IRAs are not eligible for rollover to a QRP.

Before completing this form, please confirm the QRP will accept monies from your IRA as a direct rollover.

1 Provide Information About the Account Owner

_____ . _____ . _____
 First name Middle initial Last name

 (_____)
 U.S. Social Security number Telephone: Daytime Evening Cell

2 Indicate the Accounts to be Distributed

_____	\$ _____	OR	OR	_____ %
Account number or Plan ID	Amount	Shares	Percentage	
_____	\$ _____	OR	OR	_____ %
Account number or Plan ID	Amount	Shares	Percentage	
_____	\$ _____	OR	OR	_____ %
Account number or Plan ID	Amount	Shares	Percentage	
_____	\$ _____	OR	OR	_____ %
Account number or Plan ID	Amount	Shares	Percentage	

*For SIMPLE IRAs, the two-year participation requirement must be met before requesting a direct rollover. For partial distributions from SEP, SARSEP and SIMPLE IRAs, funds will be removed on a pro-rata basis from your funds and money types unless you provide alternate instructions.

3 Provide Instructions for the Distribution Check

Make the check payable to:

Plan Name: _____ Account
 or Plan ID: _____

We will mail the check to you at your address of record unless you provide alternate mailing instructions below:

Name: _____

Address: _____

City: _____ State: _____ ZIP: _____

4 Provide RMD Instructions (if applicable)

If you have reached the starting age for required minimum distributions (RMDs), please review the information below. RMD funds cannot be included in your rollover to the QRP.

We will issue a check payable to you for your current year RMD amount (or the remaining amount, if you have already withdrawn a portion) unless you mark the box below.

I have withdrawn (or will withdraw) the American Century Investments portion of my annual RMD from an IRA at another financial institution. Please proceed with the direct rollover without removing the RMD.

Notice of Withholding: The RMD amount distributed from your IRA may be fully or partly taxable. If you do not have income tax withheld from your RMD payment, or if you don't have enough 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.

If you want to have federal income tax withheld from the RMD payment, indicate the percentage to withhold (minimum 10%): _____%*

**If left blank, we will not withhold federal income tax. If you indicate 1-9%, we will default to 10% withholding. State tax will be withheld if, at the time of your distribution, your address is within one of the mandatory withholding states.*

5 Provide Your Signature

By signing this form, I certify that:

- I intend to roll over my IRA assets to the qualified retirement plan (QRP) designated above.
- I have confirmed that the QRP will accept the IRA monies as a direct rollover.
- I understand that American Century Services, LLC (American Century) will code the distribution as a direct rollover, distribute the RMD to me if applicable (unless I have elected not to have the RMD paid to me), and generate an IRS Form 1099-R to me and the IRS by January 31 of the year following the year in which the direct rollover was completed.
- I understand that American Century will have no responsibility for any tax consequences that occur if the monies are ineligible for rollover and/or the QRP rejects the direct rollover. I also agree to defend, hold harmless and indemnify American Century and its officers, agents, employees, affiliates and successors from liability for any loss, claim or expense that I may sustain as a result of their acting on my instructions contained in this form.



Signature

Date signed

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Individual Investors
P.O. Box 419200
Kansas City, MO 64141-6200
Phone: 1-800-345-2021
Fax: 1-888-327-1998

Investors Using Advisors
P.O. Box 419786
Kansas City, MO 64141-6786
Phone: 1-800-378-9878
Fax: 1-888-327-2013

Business Retirement Investors
P.O. Box 419385
Kansas City, MO 64141-6385
Phone: 1-800-345-3533
Fax: 1-888-327-1997