

Please call us if your IRA has "as beneficiary of" in the registration. This form cannot be used for Beneficiary IRAs.

U.S. Social Security number	Date of birth (mm-dd-yyyy)	Telephone number
123-45-6789	01-01-2000	123-456-7890

4 Provide Withholding Instructions

Federal Tax Withholding: Please review the enclosed [IRS Form W-4R](#) then complete the section below. Consult a tax advisor if you need help determining the federal withholding rate that is appropriate for your situation.

Your withholding rate is determined by the type of payment you will receive. For non-periodic payments, **the default withholding rate is 10%.** (This also applies to automatic withdrawals from American Century Investments IRAs.)

You can choose to have a different rate by entering a rate from 0% to 100% on the line below. Generally, you can't choose less than 10% for payments to be delivered outside the United States and its territories. See the instructions and the [Marginal Rate Tables](#) on the enclosed *IRS Form W-4R* for additional information.

If you do not want 10% withheld, enter a different rate: _____% (Enter 0%-100%; no decimals.
If left blank, 10% will be withheld.)

State Tax Withholding: State tax will be withheld according to state regulations if, at the time of your withdrawal, your tax residency is within one of the mandatory withholding states.

5 Provide Reinvestment Instructions

Tell us which taxable account(s) should receive your RMD for reinvestment. Please note:

- Your name must be in the registration of the taxable account.
- There is no minimum to transfer to existing accounts. For new accounts, most funds require an initial investment of \$2,500; this is waived if you set up an automatic RMD plan that reinvests at least \$500 a year in the new account.
- For SEP, SARSEP and SIMPLE IRAs, the RMD must be reinvested in the same number of funds or fewer. For example, if you take your RMD from three funds in your SEP IRA, you can list up to three taxable accounts below.
- If this step is left blank, we will reinvest in individual taxable accounts in the same funds as the RMD accounts in step 3 (if minimums are met). If we are unable to reinvest your RMD, we may mail a check to you.

Fund Name	Account Number or "New"	Percentage
		%
		%
		%

6 Review and Sign

By signing, I agree that:

- American Century Services, LLC (American Century) is authorized to complete RMD calculations, if requested on this form. The Uniform Lifetime table will be used unless my spouse is 10 years younger than me and is my sole primary beneficiary, in which case the Joint Life Expectancy table applies. American Century will make every effort to calculate my RMD correctly, but it is ultimately my responsibility to ensure my RMD is satisfied.
- I have read and understand the *IRS Form W-4R* that was provided to me with this distribution form, and my withholding election is based on the W-4R form's instructions and Marginal Rate Tables. I have independently verified that the W-4R form I received is the most current IRS version available. My signature and date on this distribution form also serves as my W-4R form withholding election signature.
- The Average Cost method will be used for new taxable accounts. I understand that if I want to change the cost basis method, I must change it online or submit a *Cost Basis Election Form*.
- If I have provided incomplete or inaccurate information, I agree to defend, hold harmless and indemnify American Century; the Custodian, State Street Bank and Trust Company; their officers; agents; employees; affiliates and successors from any liability should I fail to satisfy IRS minimum distribution requirements.

Signature

Date signed

If your RMD is \$100,000 or more and you are not the sole owner of the taxable account(s), your signature must be guaranteed. Call us for signature guarantee instructions.

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americancentury.com

Traditional and Rollover IRAs
P.O. Box 419200
Kansas City, MO 64141-6200
1-800-345-2021
(fax) 1-888-327-1998

SEP, SARSEP and SIMPLE IRAs
P.O. Box 419385
Kansas City, MO 64141-6385
1-800-345-3533
(fax) 1-888-327-1997