



IRA REQUIRED MINIMUM DISTRIBUTION FORM

If you have reached age 70½, the Internal Revenue Code requires you to take an annual minimum distribution from your Traditional and SEP IRA. Failure to take the appropriate minimum amount may result in a tax penalty. Please consult a tax advisor if you have questions regarding your RMD and how to satisfy the requirement. If you maintain more than one fund IRA with the Giant 5 Funds, please submit a distribution form for each fund account that a distribution is taking place. If you have any questions or would like assistance with this form, please call the Giant 5 Funds at 1-888-544-2685. Once completed, please mail the form to Giant 5 Funds, P.O. Box 2175, Milwaukee, WI 53201-2175.

1. Account Information

Account Number

Fund Name

Participant Name

Social Security Number

Date of Birth

2. Required Minimum Distribution Election

Complete this section if you would like Giant 5 Funds to calculate your required minimum distribution with respect to your Giant 5 Funds accounts only. Your distribution will be calculated based on either (Please check one):

Uniform Lifetime Table: *This option will be used for all IRA required distributions unless your sole beneficiary is your spouse and is more than 10 years younger than you.*

OR

Joint and Last Survivor Table: *You may only choose this option if your spouse is more than 10 years younger than you and your spouse is the sole primary beneficiary of your IRA.*

If you rolled over or transferred your retirement account to the Giant 5 Funds after December 31, 2007, please list the retirement account balance as of December 31, 2007.

\$ _____

Account Balance as of December 31

3. Frequency of Distribution

Please indicate how often you would like your distribution to occur. **A Medallion Signature Guarantee is required for amounts over \$100,000 (See Section 6).**

Single distribution of the current year's required minimum distribution amount. If you wish to take a specific dollar amount other than the RMD amount, please list below. **If no dollar amount is listed, the calculated RMD amount will be used.**

\$ _____

A distribution fee of \$15.00 for each distribution will be charged for distribution methods other than periodic payments (Systematic Withdrawal Plan). This fee will be deducted from your custodial account for each distribution unless this fee is paid in advance.

Please charge the \$15.00 distribution fee to the account.

Please do not charge the \$15.00 distribution fee to the account. I have enclosed a check made payable to Giant 5 Funds.

Periodic Payment (please choose frequency):

Monthly Quarterly Semi-annually Annually

If you choose a periodic payment, please indicate on which of the following days you would like it to be issued:

5th or 20th of the month

Beginning the month of _____, 20_____.

If you wish to take a specific dollar amount other than the RMD, please list the dollar amount per distribution below **If no dollar amount is listed, the calculated RMD amount will be used divided by the number of payments. The RMD will be calculated on an annual basis.**

\$ _____

4. Method of Payment

Please select the payment method you prefer.

- Check to address of record.
- Check to different address (*Requires Medallion Signature Guarantee; See Section 6*).

Name		
Street Address		
City	State	Zip

- Please deposit in my existing non-IRA Giant 5 Funds account*:

Account Number	Fund Name
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- Please deposit into a new non-IRA Giant 5 Funds account*. I have attached a completed new account application.

** If your existing or new non-IRA account is registered to a name other than your name only (i.e., joint account), a Medallion Signature Guarantee is required (See Section 6).*

- Please send my distribution to the bank listed on my account via:

- Electronic Funds Transfer (2-3 business days; no fee)
- Wire (A \$15.00 fee will be charged.)
- Please charge the \$15.00 fee to the account.
- Please do not charge the \$15.00 wire fee to the account. I have enclosed a check for the \$15.00 made payable to Giant 5 Funds.

- Please send my distribution to the bank listed below (*Requires Medallion Signature Guarantee; See Section 6*) via:

- Electronic Funds Transfer (2-3 business days; no fee)
- Wire (A \$15.00 fee will be charged.)
- Please charge the \$15.00 fee to the account.
- Please do not charge the \$15.00 wire fee to the account. I have enclosed a check for the \$15.00 made payable to Giant 5 Funds.

Please attach a voided, unsigned check or savings account deposit slip for the bank account listed below.

Bank Name

Street Address

City State Zip

Name(s) on Account

ABA Routing Number Account Number

This is a checking account savings account

5. Withholding Information (Substitute W-4P OMB)

The distribution(s) you receive from Giant 5 Funds IRA accounts in your name are subject to federal income tax withholding at a rate of 10 % unless you elect not to have withholding apply. Withholding will only apply to the total amount of the distribution, whether taxable or not. If Giant 5 Funds does not receive notification from you, Giant 5 Funds will maintain your current account election. If no account election exists and you do not make an election by the date of your distributions, federal income tax will be withheld from the distribution. If you elect not to have withholding apply to your distribution payments, or if you do not have enough federal income tax withheld from your distribution, you may be responsible for payments of estimated tax. You may incur penalties under the estimated tax rules if your withholding and estimated tax payments are not sufficient.

- Please withhold 10% federal income tax from my distribution.
- Please withhold _____% (greater than 10%) federal income tax from my distribution.
- Please do not withhold any federal income tax from my distribution. (You must have a U.S. Residence on File)

6. Signatures and Medallion Signature Guarantee

I certify that I am the Participant authorized to make these elections and that all information provided by me is true and accurate, and I further certify that no tax advice has been given to me by the Custodian and that all decisions regarding my distribution are my own. I expressly assume the responsibility for any adverse consequences which may arise from the above selections and I agree that the Custodian shall in no way be responsible for those consequences.

Participant

Date

Required if proceeds are going to a payee, address, or bank account other than those listed on your account, if the redemption amount is over \$100,000, or if you are depositing your distribution into an existing or new non-IRA account which is registered to a name other than your name only.

A medallion signature guarantee may be obtained from a member of a national securities exchange, a U.S. commercial bank, trust company or

federally chartered savings and loan or other eligible guarantor institution. **A notary public is not an acceptable guarantor.**

Medallion Signature Guarantee