

I'm not robot!

Account Number	2021	Customer
Account Type	Account	Account
Account Name	Account	Account
Account Address	Account	Account
Account City	Account	Account
Account State	Account	Account
Account Zip	Account	Account
Account Phone	Account	Account
Account Fax	Account	Account
Account Email	Account	Account
Account Website	Account	Account
Account Social Media	Account	Account
Account Other	Account	Account



E\*TRADE Securities LLC  
P.O. Box 484  
Jersey City, NJ 07303 – 0484  
General Fax: 1-866-650-0003

E*TRADE Securities IRA Account Number					

#### IRA DISTRIBUTION REQUEST FORM

- Trying to take a distribution from a Beneficiary IRA or due to the death of an IRA account holder? Use our [Beneficiary Distribution Request Form - IRA](#) instead.
- Did you know you can request common types of distributions online? Please visit [www.etrade.com/onlineDistribution](#). It's easier and faster!
- Need Help? Send us a Secure Message through [www.etrade.com](#) or call 1-877-921-2434 from 7AM to 12AM EST, Monday through Friday.

<b>1. IRA ACCOUNT HOLDER INFORMATION</b> (Guardian Information if Minor IRA)					
Account Holder Name (first, middle initial, last)			Account Type		
Address			<input type="checkbox"/> Traditional IRA <input type="checkbox"/> Rollover IRA <input type="checkbox"/> Roth IRA <input type="checkbox"/> SEP IRA <input type="checkbox"/> SIMPLE IRA		
City, State/Province			Zip/Postal Code		
Date of Birth (mm/dd/yyyy)	Social Security Number	Country Code	Home Phone Number	Country Code	Business Phone Number

<b>2. DISTRIBUTION REASON</b>											
ADDITIONAL INFORMATION MAY BE REQUIRED TO COMPLETE YOUR DISTRIBUTION REQUEST. PLEASE REVIEW THE ADDITIONAL REQUIREMENTS AND INFORMATION ON PAGE 4 REGARDING THE DISTRIBUTION REASONS LISTED BELOW.											
<input type="checkbox"/> <b>1A. Normal Distribution</b> (over age 59½)	<input type="checkbox"/> <b>5. Revocation</b> (within 7 days of opening account)										
<input type="checkbox"/> <b>1B. Normal Distribution - Roth IRAs</b> (over age 59½) <input type="checkbox"/> This is a Qualified Distribution	<input type="checkbox"/> <b>6. Disability</b> Pursuant to IRC 72(m)(7)										
<input type="checkbox"/> <b>2A. Premature Distribution*</b> (under age 59½) This option also applies for first time home buyers, medical/Health Savings Accounts (HSA), or education expenses.	<input type="checkbox"/> <b>7. Transfer Pursuant to Divorce</b> Also attach a copy of the <u>final</u> divorce decree.										
<input type="checkbox"/> <b>2B. Premature Distribution* - SIMPLE IRAs</b> (under age 59½) This option also applies for first time home buyers, medical/Health Savings Accounts (HSA), or education expenses. <input type="checkbox"/> It has been more than 2 years since my first SIMPLE IRA contribution	Recipient's Name <table><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table> Recipient's E*TRADE IRA (Required)										
<input type="checkbox"/> <b>3. Premature with Exception: Substantially Equal Periodic Payments</b> You must attach a calculation, pursuant to IRC 72(t)(2)(A)(v).	<input type="checkbox"/> <b>8. Direct Rollover to Qualified Employer Plan</b> Also complete the section below.										
<input type="checkbox"/> <b>4. Excess Contribution Removal*</b> Also complete Section 3: Excess Removal.	Employer Plan Name Employer Plan Account Number Make Check Payable To Employer Plan Address (direct rollover check will be mailed to this address)										
<div>* A \$25 fee may apply. The fee will be waived if combined E*TRADE Securities brokerage account balances total at least \$100,000 or you have placed 30 or more trades in the preceding calendar quarter.</div>											

# 2018

## Instructions for Forms 1099-R and 5498



Department of the Treasury  
Internal Revenue Service

### Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

Section references are to the Internal Revenue Code unless otherwise noted.

#### Future Developments

For the latest information about developments related to Forms 1099-R and 5498 and their instructions, such as legislation enacted after they were published, go to [IRS.gov/Form1099R](#) or [IRS.gov/Form5498](#).

#### What's New

**No recharacterizations of conversions made in 2018 or later.** A conversion of a traditional IRA to a Roth IRA, and a rollover from any other eligible retirement plan to a Roth IRA, made after December 31, 2017, cannot be recharacterized as having been made to a traditional IRA.

**Disaster distributions.** Special rules apply to retirement plan distributions made to employees affected by certain natural disasters that occurred in 2018 and 2017. See Pub. 970, *Disaster Relief*, for more information.

#### Form 1099-R

**Reportable policy sale box.** We have added a new box to show the date of a payment of reportable death benefits and added instructions to the recipient copy. See [Reportable death benefits and Date of Reportable](#), later.

**New distribution codes.** We have added two new distribution codes, C and M, for box 7.

#### Form 5498

**New rollover code.** We have added code "PC" for reporting qualified plan loan offset rollovers.

#### Reminder

In addition, see the 2018 General Instructions for Certain Information Returns for information on the following topics:

- Who must file (nominees/middlemen, certain Foreign Financial Institutions (FFIs) and U.S. payors that report on Form(s) 1099 to satisfy their chapter 4 reporting requirements).
- When and where to file.
- Electronic reporting requirements.
- Corrected and void returns.
- Statements to recipients.
- Taxpayer identification numbers (TINs).
- Backup withholding.
- Penalties.
- The definitions of terms applicable for chapter 4 purposes that are referenced in these instructions.

- Other general topics.

You can get the general instructions from [General Instructions for Certain Information Returns at IRS.gov/pub/irsinfo/instructions](#) or go to [IRS.gov/Form1099R](#) or [IRS.gov/Form5498](#).

#### Specific Instructions for Form 1099-R

File Form 1099-R, *Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.*, for each person to whom you have made a designated distribution or are treated as having made a distribution of \$10 or more from profit-sharing or retirement plans, any individual retirement arrangements (IRAs), annuities, pensions, insurance contracts, survivor income benefit plans, permanent and total disability payments under life insurance contracts, charitable gift annuities, etc.

Also, report on Form 1099-R death benefit payments made by employers that are not made as part of a pension, profit-sharing, or retirement plan. See [Box 1](#), later.

Payments of reportable death benefits in accordance with final regulations that will be published under section 6050Y must be reported on Form 1099-R.

Reportable disability payments made from a retirement plan must be reported on Form 1099-R.

Generally, do not report payments subject to withholding of social security and Medicare taxes on this form. Report such payments on Form W-2, *Wage and Tax Statement*.

Generally, do not report amounts totally exempt from tax, such as veterans' compensation and Department of Veterans Affairs (VA) payments. However, if part of the distribution is taxable and part is nontaxable, report the entire distribution in box 1 and the taxable part in box 2a when known.



There is no special reporting for qualified charitable distributions under section 408(d)(6), qualified health savings account (HSA) funding distributions described in section 401(d)(9)(B), or for the payment of qualified health insurance premiums (including long-term care insurance premiums) for retired public safety officers described in section 402(c).

**Reportable death benefits.** Section 6050Y, which was added to the Code by P.L. 115-97, imposes new information-reporting obligations for payments of reportable death benefits after December 31, 2017. The term "reportable death benefits" means "amounts paid by

Form 1040EZ		Department of the Treasury—Internal Revenue Service	
Income Tax Return for Single and Joint Filers With No Dependents			
Your first name and initial		2011	
If a joint return, spouse's first name and initial	Last name		
Home address (number and street). If you have a P.O. box, see instructions.	Last name		
City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).			
Foreign country name			
Income			
Attach Form(s) W-2 here.	1 Wages, salaries, and tips. Attach your tax statement.	Foreign province/county	



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