

Traditional IRA Required Minimum Distribution Form



If you are age 70 ½ or older, use this form to request the calculation of the required minimum distribution for your Homestead Funds Traditional IRA accounts, including IRA rollover accounts. Please print neatly in blue or black ink.

If you previously instructed us to process required minimum distributions over the life of your account or accounts, you do not need to complete this form again. If you have a question about your distribution requirement or this form, call us at 1-800-258-3030.

Return your completed form to Homestead Funds using the postage-paid envelope provided, or mail to:

REGULAR MAIL

Homestead Funds
c/o BFDS
P.O. Box 219486
Kansas City, MO 64121-9486

OVERNIGHT MAIL

Homestead Funds
c/o BFDS
330 W. 9th Street, 1st Floor
Kansas City, MO 64105-1514
Attn: Shareholder Services

FAX TO:

703-907-5606

Note: Forms with a Medallion Stamp Signature Guarantee cannot be faxed.

 Be sure to sign your completed form (section 6).

1. Ownership

Tell us how your accounts are registered and provide your account numbers. If multiple accounts are listed, the instructions you provide in sections 2, 3, 4 and 5 will be applied to each account.

First Name

Middle Initial

Last Name

Social Security Number

Birth Date (mm/dd/yyyy)

Traditional IRA Account Number

Traditional IRA Account Number

Check one: Traditional IRA Inherited IRA

Check one: Traditional IRA Inherited IRA

Traditional IRA Account Number

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Check one: Traditional IRA Inherited IRA

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Daytime phone (In case we have a question about your application.)

4. Payment Instructions

Tell us how you would like to receive redemption proceeds. Your signature on this form must be guaranteed if the amount of any single redemption payment from any one fund in any one account is \$50,000 or more or if you are exchanging to an existing nonretirement account that you do not own.

Check one:

- Send check payable to IRA account holder (mail to address on record).
- Send proceeds by ACH transfer to bank account of record.
If we do not yet have bank information on file, also complete an Account Services Form (available at www.homesteadfunds.com).
- Deposit proceeds in an **existing** non-retirement Homestead Funds account. (You must be an account owner or have a Medallion Stamp Signature Guarantee. See section 7.)

Account Number

Fund Name

- Deposit proceeds in a **new** nonretirement Homestead Funds account.
A completed Regular Account Application (available at www.homesteadfunds.com) must accompany this form.

5. Federal Income Tax Withholding

If you do not check a box below, IRS regulations require us to withhold 10% of your distribution for payment of federal income tax. We encourage you to consult your accountant or tax adviser regarding your IRA distributions. Even if you elect not to have federal income tax withheld, you are liable for payment of federal income tax on the taxable portion of your distribution. You may be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding are not adequate.

Check one:

- I elect not to have income tax withheld from each distribution.
- I elect to have 10% income tax withheld from each distribution.
- I want this amount withheld from each distribution payment: _____ %.
Select a percentage of at least 10%. If you indicated in section 2 that your redemption and payment instructions apply to future years, the withholding election provided here will apply in future years unless we receive different instructions from you.

