

# REQUIRED MINIMUM DISTRIBUTION FORM

For more information, contact us toll free at 800.820.0888,  
direct dial 301.296.5406 or fax 301.296.5103.

Visit our web site at [www.rydex-sgi.com](http://www.rydex-sgi.com).

Standard delivery: P.O. Box 758567, Topeka, KS 66675-8567

Overnight delivery: 200 SW 6th Street, Topeka, KS 66603-3704

AC: \_\_\_\_\_  
*For internal use only*



Use this form if you are 70½ or older and need to request your Required Minimum Distribution (RMD) as specified by the IRS. All other types of IRA distributions should use the IRA Distribution form. You may use this form to make a new request or to change existing information on file. If you have any questions about completing this form, please contact us at the numbers above.

## 1. ACCOUNT INFORMATION

- New Request                       Change to existing information

\_\_\_\_\_  
Name

\_\_\_\_\_  
Account Number

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Spouse's Date of Birth (if applicable)

## 2. CALCULATION

- Please calculate my distribution.                       I have calculated my distribution. Please distribute \$ \_\_\_\_\_

## 3. FREQUENCY OF DISTRIBUTION (SELECT "ONE TIME DISTRIBUTION" OR "PERIODIC DISTRIBUTION")

One Time Distribution

Process immediately

Process on \_\_\_\_\_  
(Specify Month)                      (Specify Date)

OR

Periodic Distribution

- Please start my                       Monthly  
 Quarterly (March, June, September,  
December, unless specified)  
 Semi-annual  
 Annual

payment on \_\_\_\_\_  
(Specify Month)                      (Specify Date)

*If the date selected falls on a weekend or holiday your request will be processed on the previous business day, unless specified otherwise.*

## 4. METHOD OF PAYMENT

Send check(s) to address of record.

Distribute to Rydex Investments

Account # \_\_\_\_\_

to \_\_\_\_\_

(indicate fund)

(See section 6, a signature guarantee may be required)

Send to my bank via ACH.

(Voided check must be attached for new instructions)

Bank \_\_\_\_\_

Account # \_\_\_\_\_

## 5. TAX WITHHOLDING (FORM W-4P: OMB NO. 1545-0415)

- No, I do not want federal income tax withheld from my distribution.
- Yes, I want federal income tax withheld from my distribution.

Please withhold \_\_\_\_\_%. The minimum withholding amount is 10%.

If no election is made, Rydex Investments will automatically withhold 10% for tax purposes.

**PLEASE NOTE:** 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 also be subject to tax penalties under the estimated tax payment rules if your payment of estimated tax and withholding, if any, are not adequate.

### BASIC INFORMATION ABOUT WITHHOLDING ON DISTRIBUTIONS

Use Form W-4P to tell payers the correct amount of federal income tax to withhold from your payment(s). You may also use Form W-4P to choose (a) not to have any income tax withheld from the payment (except for eligible rollover distributions or payments to U.S. citizens delivered outside the United States or its possessions) or (b) to have an additional amount of tax withheld.

We must withhold at a flat 10% rate from nonperiodic and periodic payments unless you choose not to have federal income tax withheld. Distributions from an IRA that are payable on demand are treated as nonperiodic payments. You can choose not to have income tax withheld from a nonperiodic payment by submitting Form W-4P, or a substitute form (section five above), to Rydex Investments and checking the appropriate box on the front of this form. You can choose not to have income tax withheld from a periodic payment by submitting Form W-4P, or a substitute form, to your custodian and checking the appropriate box on the front of this form.

Generally, your choice not to have income tax withheld will apply to any later payment from the same plan. If you want to revoke your previously filed exemption from withholding, for future distributions, file another Form W-4P or substitute form.

*Caution: There are penalties for not paying enough federal income tax during the year, either through withholding or estimated tax payments.*

## 6. SIGNATURE

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

If you selected "Distribute to Rydex Investments Account":

- A signature guarantee is not required if you are depositing your withdrawal proceeds into an account with the exact same registration.
- If registrations are not exact, please use the table below to determine if a signature guarantee is required.

Place Medallion Signature Guarantee Here

#### Receiving Account Type

Distributing Account Type	Receiving Account Type	
	Individual, Joint, UGMA, all IRAs	Trust, Self-Directed Retirement Plans, Corporations and Other Entities
Individual, Joint, UGMA, all IRAs	Signature guarantee if \$25,000 or greater	Signature guarantee required regardless of amount
Trust, Self-Directed Retirement Plans, Corporations and Other Entities	Signature guarantee required regardless of amount	Signature guarantee required regardless of amount