

# Request for IRA distribution



## Return by mail:

Putnam Investments  
PO Box 219697  
Kansas City, MO 64121-9697

## Return by express delivery:

Putnam Investments  
430 W 7th Street Suite 219697  
Kansas City, MO 64105-1407

## For more information:

Putnam Investments  
1-800-662-0019  
www.putnam.com



Use this form to request a complete, partial, or systematic distribution from your Putnam IRA or Beneficiary IRA. Your distribution may have tax consequences. Please consult your tax advisor if you have any questions.

### Important:

- To request your annual required minimum distribution as a systematic withdrawal, please contact Putnam for the appropriate form.
- Do not use this form to request an IRA to IRA transfer of assets.** Transfers to an IRA with another company must be initiated with the receiving company's paperwork and must include a letter of acceptance.

## Section 1 Account owner information

Name of account owner

First	MI	Last	Suffix	Social Security number (required)	Date of birth (mm/dd/yyyy; required)

Contact phone number

If you have not provided Putnam with your Social Security number or you are a nonresident alien or a U.S. person living outside the United States, your distributions will be subject to the mandatory tax withholding rate, regardless of your withholding election in Section 5.

**Note:** Providing a phone number above will replace the current contact information on file with Putnam (if applicable). If this field is left blank, no changes will be made.

## Section 2 Type of distribution

I request the following (check one):

### Distribution

- Normal; distribution made at age 59 1/2 or older
- Premature; distribution made before age 59 1/2 (early distribution penalties may apply)
- Substantially equal periodic payments under section 72(t) of the Internal Revenue Code (must select systematic distributions in Section 4 below)
- Disability (if you are requesting a waiver of a CDSC per the terms of the applicable prospectus, you must include a notarized doctor's note or letter of determination from the Social Security Administration)
- Distribution from an existing Putnam Beneficiary IRA account

### Direct Rollover (to qualify for a rollover the proceeds must be payable to the receiving firm)

- Rollover to your employer sponsored 403(b), 401(k), Money Purchase Plan, Profit Sharing Plan, or Government 457 retirement plan (the client is responsible for ensuring that the requested distribution is eligible for rollover to an employer sponsored retirement plan)

**Note:** A signature guarantee/medallion guarantee is required for all direct rollover requests unless a letter of acceptance is provided **and** the distribution amount is below \$100,000.

## Section 3 One time distribution

Please indicate the dollar amount or percentage to redeem from each applicable account. If both a dollar amount and percentage are provided, Putnam will default to distributing by percentage.

Fund number	Account number	Dollar amount	Percentage
<input type="text"/>	- <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %
<input type="text"/>	- <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %
<input type="text"/>	- <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %
<input type="text"/>	- <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %
<input type="text"/>	- <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %

## Section 4 Systematic distribution options

Please indicate a date and frequency for systematic distributions. If no date is selected, Putnam will default to the 15th. If the systematic distribution date falls on a weekend or a holiday, the distribution will be made the next business day. If the distribution date falls on a date that does not occur within a particular month (29th-31st), the distribution will be made the prior day, unless this day falls on a weekend or holiday then the distribution will be made the next business day. For 72(t) distributions, you must select a distribution date of the 1st through the 28th.

### Important:

- Systematic distributions cannot be requested by a power of attorney.
- Assets cannot be systematically distributed into a 529 for America account.

### Step 1: Distribution allocation(s)

Fund number	Account number	Dollar amount	Annualized Percentage
<input type="text"/>	- <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %
<input type="text"/>	- <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %
<input type="text"/>	- <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %

### Step 2: Distribution frequency

Choose a frequency below. Putnam will default to once per year if no option is selected:

Frequency:  Distribute every month (enter distribution date(s) below) or  Distribute only in the month(s) chosen below:

Jan  Feb  Mar  Apr  May  June  July  Aug  Sept  Oct  Nov  Dec

Additional distribution date(s) within each month (if applicable)

(MM/DD/YYYY)

(DD)

(DD)

(DD)

Begin scheduled distributions on





## Section 5 Income tax withholding

Putnam will not withhold federal or state income taxes when you elect to rollover to an employer sponsored plan in Section 2. See below for the federal and state withholding considerations for all other distribution types. If you have elected systematic distributions, the election you make below will apply to all distributions.

### IRA federal withholding

Federal income taxes will be withheld at a rate of 10% (**except for Roth plans**) unless you elect not to have taxes withheld or provide a different rate below.

Do not withhold federal income tax from my total distribution.

Withhold federal income tax at a rate of \_\_\_\_\_ %

Withhold my taxes from the distribution proceeds, **gross** (this will be the default withholding option if no choice is made)

Withhold my taxes from the remaining account balance, **net** (only allowed for one time distributions)

### Roth federal withholding

Putnam will default to no federal withholding for Roth IRA distributions unless specified below.

Withhold federal income tax at a rate of \_\_\_\_\_ %

Withhold my taxes from the distribution proceeds, **gross** (this will be the default withholding option if no choice is made)

Withhold my taxes from the remaining account balance, **net** (only allowed for one time distributions)

### State income taxes

Putnam will withhold state income taxes if your address of record is in one of the following states: AR, CA, CT\*, DE, IA, KS, MA, ME, MI\*, MN\*, NC, OK, OR, VT or the District of Columbia (DC)\*\* and federal income tax is being withheld. State tax withholding requirements vary by state.

\*Residents of CT, MI or MN will have state income taxes withheld regardless of federal income tax withholding. To opt out of CT, MI, or MN state income taxes, the appropriate state specific form must be submitted with this distribution request or already on file with Putnam.

\*\*Residents of DC will have local income taxes withheld on 100% distributions regardless of federal income tax withholding.

**Note:** Whether or not you elect to have federal and, if applicable, state tax withholding apply, you are responsible for the full payment of federal income tax, any state or local taxes, and any penalties that may apply to your distribution. You may be responsible for estimated tax payments and could incur penalties if your estimated tax payments are not sufficient.



