

**PARTICIPANT
DEATH BENEFIT
DISTRIBUTION
ELECTION FORM**



Instructions:

1) Complete each section of your application form as follows:

Section A – Please type or print all entries for the deceased Participant’s account. All fields in this section must be completed in full (no redactions please).

Section B – Please type or print all entries for the Beneficiary requesting the payout. All fields in this section must be completed in full (no redactions please). Be sure to attach a copy of the Death Certificate as well as a copy of a signed Beneficiary Designation document naming you as a beneficiary.

Section C – Indicate your desired distribution elections: 1) Direct Distribution paid to you (taxes may apply), 2) Rollover to an IRA held in your name, or 3) Rollover to a Qualified Retirement Plan (QRP) account held in your name.

Section D – Indicate which Money Type(s) or Source(s) you would like distributed. Please complete a separate distribution election form for each unique Money Type/Source indicated in this section.

Section E – Indicate your payee and mailing details. All payments will be made by check and sent using USPS First Class Mail. You have the option to have your check sent via UPS/FedEx/Overnight (cannot send to a PO Box) for an additional fee. Electronic fund transfers such as wire, direct deposit, or ACH are not available. The Plan will rely solely on the payee and mailing instructions provided by you and is not responsible for transmittal errors, which may lead to a rejected transmittal by the receiving financial institution or deposits being credited to an incorrect account. Please be sure to verify your payee and mailing details with the receiving financial institution, and if available, attach transmittal instructions supplied to you by the receiving financial institution to your completed election form. Additional fees may apply for rejected, returned, or reissued transmittals. Your distribution and payment elections are irrevocable.

Section F – Indicate your tax withholding elections. For direct distributions, a Federal income tax withholding of 20% is mandated. In addition, State taxes will be withheld for States that mandate state income tax withholdings. You have the option to have additional amounts withheld for Federal and/or State income taxes.

Please print your name, sign and date the form. Do not submit your completed application form to the Plan Sponsor. See section 2 and 3 below for instructions for submitting your form for processing.

2) Attach a copy of one of the following forms of photo ID for yourself AND the deceased Participant (Current or Valid within the past 6 months): (Cell phone/tablet images that show the entire ID clearly, as well as black and white photocopies, are accepted)

- Driver’s license or photo ID card issued by federal, state or local government agency
- U.S. Passport, U.S. Passport Card, or Foreign Passport
- Permanent Resident Card or Alien Registration Receipt Card (Form I-551)
- College/University ID card that contains a photograph
- U.S. Military card or U.S. Coast Guard Merchant Mariner Card
- Native American tribal document that contains a photograph
- Employment Authorization Document that contains a photograph (Form I-766)

3) Return the completed (and signed) application form to RPG Consultants for processing. Do not send your form directly to the Plan Sponsor. Our office will obtain the Plan Sponsor’s authorization and signature on a separate document. Partially completed forms will be rejected and returned to sender. You may upload your completed application form securely to our website using our secure file transfer portal at <https://files.rpgconsultants.com/filedrop/Support> or visit www.rpgconsultants.com, click on the “Secure File Upload” link from the Resources > Client Resources menu and select the “Support” department. On the file upload page, enter your email address, Plan name and your full name in the subject line, enter an optional message in the body, and attach your application form and copy of picture ID (see section 2 above). Be sure to click the “Send” button at the bottom of the screen and wait for appearance of the “**Files Sent, Thank you!**” on-screen confirmation message (shown below) before closing the web page. If you prefer to send your application form by e-mail, please send to support@rpgconsultants.com. If you prefer to send by fax, please send to 1 (212) 947-4866.

Files Sent, Thank you!

Important Information: Our processing timeline is 5 to 15 business days. Processing fees apply. Depending on your distribution elections, Federal and/or State tax withholdings may apply. For more details, please carefully review the Special Tax Notice available at <http://specialtaxnotice.rpgconsultants.com>. A Form 1099-R tax document will be issued and mailed to you at the end of January of the following year.

