

**PARTICIPANT
DISTRIBUTION
ELECTION FORM
(FOR NON-QUALIFIED
DEFERRED COMPENSATION/
INCENTIVE BONUS PLANS)**



Instructions:

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

Section A – Please type or print all entries. All fields in this section must be completed in full (no redactions please).

Section B – Indicate your desired distribution elections: 1) Distribute your entire account balance, 2) Distribute a specified dollar amount from a specified Source or Money Type (Note: Your Plan's provisions may not permit this type of withdrawal, please review your Plan's provisions or contact RPG Support for more information.)

Please print your name, sign and date the form. Do not submit your completed application form to your (former) Employer. See sections 2 and 3 below for instructions for submitting your form for processing.

2) Attach to your application a copy of one of the following forms of photo ID (must be valid or recently expired):

(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 your (former) Employer. Our office will obtain your (former) Employer'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.

Files Sent, Thank you!

Important Information: Our processing timeline is 15 business days from the date of receipt of a completed distribution election form. Processing fees may apply.



**PARTICIPANT DISTRIBUTION ELECTION FORM
FOR NON-QUALIFIED DEFERRED COMPENSATION/ INCENTIVE BONUS PLANS**

SECTION A - PERSONAL INFORMATION

Plan Name:		Social Security No.:	
Participant Name:		Date of Birth:	
Address:		Date of Hire:	
Apt/Suite:		Date of Termination*:	
City, State, Zip:		E-mail Address:	
Current Age:		Phone No.:	
Marital Status:		Account Balance**:	

SECTION B - DISTRIBUTION AMOUNT

☐ Entire account balance

☐ Distribute the following amount(s)*** from the following Source(s)/Money Type(s):

Source/Money Type: _____ Amount: _____

Source/Money Type: _____ Amount: _____

Source/Money Type: _____ Amount: _____

Source/Money Type: _____ Amount: _____

Source/Money Type: _____ Amount: _____

* If applicable, enter the date of your separation from employment. Not a required field

** Enter the exact account balance as of the date of your signature at the bottom of this form. Please call RPG Support if you require assistance

*** Note: your Plan's provisions may not permit partial withdrawals

I acknowledge that a) processing fees apply, b) requests are processed within 30 days of receipt, c) accounts are liquidated pro-rata from the above-requested sources and all investments, d) the Plan will rely solely on the information provided by me on this form and is not responsible for errors in my instructions.

Date

Name (Please Print)

Signature

[03/2023]