

## 2011 - Required Minimum Distribution Supplemental Request Form

Regulations under Code Section 401(a)(9) require that a participant receive a Minimum Required Distribution (RMD) amount from his or her plan by the Required Beginning Date (RBD). The RBD is generally April 1st of the year following the calendar year in which the participant has retired or attained age 70½. In the first distribution year and in subsequent years, participants must receive the minimum amount by December 31.

As a result of recent legislation, employed participants who own less than 5% of the sponsoring employer may be able to defer RMD's until retirement, even if they have attained age 70½. The ability to defer is dependent upon plan provisions and any associated administration requirements. Owners of more than 5% of company stock (and/or family members of more than 5% owners) are required to begin receiving minimum distributions even if they continue to work.

R.J.L. Pension Services, Inc. offers RMD distribution services for \$75 per distribution, charged in accordance with plan provisions. Additional forms other than a R.J.L. Distribution Request Form (attached) may be required by your investment company.

- Our plan has a more than 5% owner (currently or in a prior year) in the plan that has attained age 70½ or nearing age 70½. (A family member of a more than 5% owner may also be required to begin RMD's.)
- Our plan has at least one employee that is 70½ and is not a more than 5% owner; the employee has elected to:
- receive the required distribution    or     continue to defer payments until retirement

### PLAN INFORMATION

Please note, the RMD will be based solely on the value of the plan **as of 12/31/2010** for a calendar year plan (unless we receive other written direction by the plan trustee) and will not consider any IRA's or other retirement plan assets.

Plan Name: \_\_\_\_\_

Plan Contact: \_\_\_\_\_ Telephone: \_\_\_\_\_

### PARTICIPANT INFORMATION

Name: \_\_\_\_\_ SSN: \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Date of Hire: \_\_\_\_/\_\_\_\_/\_\_\_\_

Marital Status: \_\_\_\_\_ If Married, Spouse Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

**\*\*THIS DISTRIBUTION IS SUBJECT TO FEDERAL TAX WITHHOLDING UNLESS YOU ELECT TO HAVE WITHHOLDING NOT APPLY. IF NO ELECTION IS MADE BELOW, THEN 10% FEDERAL WITHHOLDING WILL BE WITHHELD.**

- Do not withhold federal taxes.                       Withhold the 10% plus an additional \_\_\_\_\_.

Please process the RMD for the participant shown above. I understand a fee of \$75 per distribution is applicable for this service. The fee will be charged in accordance with plan provisions unless the investment vehicle does not permit deductions directly from the participant accounts.

\_\_\_\_\_  
Trustee/Plan Administrator Signature

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

\_\_\_\_\_  
Date

Please return this form along with the necessary fund company form to our office by **December 01, 2011**. We cannot guarantee that the RMD will be processed by **December 31, 2011** if the forms are received after this date.