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# Individual 401(k) Distribution Request Form

www.schwab.com 1-800-435-4000 (inside the U.S.) +1-415-667-8400 (outside the U.S.) 1-888-686-6916 (multilingual services)

Clients of Investment Advisors: Contact your advisor directly or call Schwab Alliance at 1-800-515-2157.

**1. Account Holder Information (Required)**

Name First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_

Schwab Account Number \_\_\_\_\_ Social Security Number \_\_\_\_\_ Telephone Number \_\_\_\_\_

**2. Employer Information (Required)**

Employer Name \_\_\_\_\_ Employer Identification Number (EIN) \_\_\_\_\_

**3. Distribution Reason**  
Choose one.

**Normal Retirement Age**  
Age 59½ or older

**Termination of Employment**

**In-Service Withdrawal: Two-Year Rule**  
Select for a withdrawal of vested Employer contributions (not including Elective Salary Deferrals) that have been in the Plan for at least two full Plan years (24 months). See Section 5.01(C)(1) of the Basic Plan Document.

**In-Service Withdrawal: Five-Year Rule**  
Select for a withdrawal of vested account balance (not including Elective Salary Deferrals and allocable income) if you have participated in the Plan for at least five years (60 months). See Section 5.01(C)(1) of the Basic Plan Document.

**Disability**  
Permanent disability within the meaning of IRS Section 72(m)(7). Consult your tax advisor.

**Hardship**  
Select for Distribution Due to Hardship as described in the Basic Plan Document, Section 5.01(C)(2). Available only if your plan's Adoption Agreement permits Hardship distributions. Note: Hardship distributions are not eligible for rollovers.

**Plan Termination**

**Distribution of Rollover Contribution**  
This distribution reason is **only** for rollover assets or transferred assets that were previously rolled into this account. Caution: This is only a distribution reason for previously rolled over assets or transferred assets from an outside plan and does not allow for distributions of employer or salary deferral contributions from this account.

**Death**  
Attach the following documents and complete the recipient information requested below.

1. Certified copy of the death certificate
2. Individual 401(k) Account Application (You must first open an Individual 401(k) account in your name for tax reporting purposes.)
3. Inherited IRA Account Application (required if rolling over to a Schwab Inherited IRA)
4. If there are multiple beneficiaries, each beneficiary must complete a separate Individual 401(k) Distribution Request Form.

**Note:** Other documents may be required. Call Schwab Estate Distribution Services at 1-888-297-0244 to discuss your individual situation.

# Distribution Direct Rollover Request 401 K Plan

**Wolfgang Guggemos**



## **Distribution Direct Rollover Request 401 K Plan:**

Taxpayer Information Publications ,2007      Beyond 401(k)s for Small Business Owners Jean D. Sifleet,2004-04-28 The ultimate reference on compensation for small businessowners Beyond 401 k s for Small Business Owners presents strategies forreducing taxes planning for your retirement and rewardinghigh performing employees Expert advice from attorney and CPA JeanSifleet will help small business owners maximize their own rewardsand create an environment in which employees know that their hardwork will mean a better future for themselves In clear simple language this book helps you figure out what kindof plan you can afford what your employees want and what to do Important tax and insurance issues are covered in detail andstep by step guidance lets you design a compensation strategy thatworks for both you and your employees Case studies sample plans and helpful references make this book your one stop source forcomplete coverage of alternatives from cash bonus programs toemployee stock option plans ESOPs and everything in between WithBeyond 401 k s for Small Business Owners you ll have all the toolsyou need to Maximize owner benefits reduce taxes and enhance yourretirement income Use creative compensation to motivate your employees Understand qualified and nonqualified plans Address the unique issues of family businesses Get the best deal on insurance and benefits for yourcompany Avoid expensive pitfalls Measure your progress and keep your plan on track      **401(k) Answer Book** ,1994      **J.K. Lasser's Your Income Tax 2008** J.K. Lasser Institute,2007-11-02 Americas 1 bestselling tax guide offers a balance of thoroughness organization and usability Written by a team of tax specialists it features easy to follow expert advice and guidance on planning and filing taxes      *Your Federal Income Tax for Individuals* ,1998      **401(k) Plans** Laurel A. Nicholson,1995      Your Federal Income Tax for Individuals United States. Internal Revenue Service,1998      *Weis V. Waterhouse Securities, Inc* ,2002      *IRS Procedural Forms and Analysis* ,2005      **Qualified Retirement Plans** ,2006      **BNA Pension & Benefits Reporter** ,2006-07      *Nonqualified Deferred Compensation Plans* ,2001      **Human Resources Report** ,2002-07      Tax Management Portfolios ,2006      **401(k) Plans** ,1997 This excellent resource for small business owners and managers allows them to understand the loan process from the banker s perspective Readers learn the seven critical questions bankers always want answered as well as the five major characteristics of a successful loan George M Dawson shows how banks make loan decisions and tells business borrowers how they can negotiate and avoid paperwork traps so they can develop better relationships with their banks An appendix explains the essentials of financial management and a glossary covers major banking terms Bank loans are the leavening of the business world This book provides clear intelligent directions to make any small business rise      *American Jurisprudence* ,1962      **Protect Your 401(k)** Larry Chambers,Ken Ziesenheim,2002-06-14 A PAPERBACK ORIGINAL Straightforward facts for all workers looking to protect their company 401 k assets in a postEnron world From Enron on down recent high profile bankruptcies have awakened American workers to the vulnerability of their 401 k plans and left millions wondering what they can do to protect themselves Protect Your 401 k hits this market with

practical accessible answers explaining everything from what a 401 k is to how to take full advantage of matching programs assert control over investment policy and more In depth enough to guide readers from starting a plan through taking distributions yet plain talking enough to be understood by all workers regardless of their backgrounds Protect Your 401 k covers Simple steps every worker should take first How 401 k plans work Advanced strategies for really putting a plan to work Warning signs of a 401 k provider in trouble How to get your money out safely **Qualified Pension and Profit-sharing Plans** ,2008 Colorado Lawyer ,1992 Basic Law of Pensions, Welfare Plans, and Deferred Compensation ,2003

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