

## Required Minimum Distributions (RMD) Request Instructions

### Important Notes:

- If this form is incomplete or not legible when returned, your request may be delayed.
- Once a payout/withdrawal has occurred it cannot be reversed.
- Questions on completing this form may be directed to the Thrivent Financial Customer Interaction Center at 800-847-4836, Monday – Friday 7am–9pm CST, or Saturday 9am–1pm CST.
- Send completed forms to: PO Box 8075, Appleton WI, 54912-9722 or fax them to 800-225-2264. For your own security, do not e-mail the completed forms to Thrivent, as e-mailed forms will not be accepted.

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### General Information

- Enter the name of the Annuitant/Owner.
- Enter the Social Security number of the Annuitant/Owner.
- Enter the annuity contract number(s).
- Enter the address and phone number of the owner.

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### Required Minimum Distribution Information

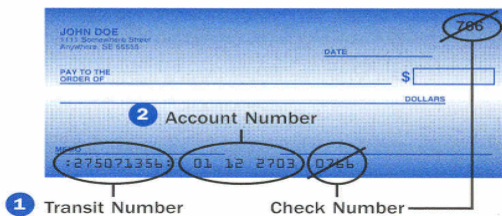
- Check the box to designate the RMD distribution frequency (annuities must be annual).
- Enter the RMD payout date (1-28).
- If your spouse is 10 years younger, please enter their date of birth.
- Check the box if you wish to delay or suspend your RMD distribution.
  - If you delay or suspend your RMD distributions, you are responsible for ensuring that your RMD is met elsewhere.

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### Method of Distribution

- Check the box to designate the distribution method: Check or Direct Deposit.
- If you are requesting Direct Deposit:
  - Fill in your bank account number, indicate checking or savings, or include a copy of a voided check.
  - For checking, the Transit number is the 9 digit routing number located on the bottom of left corner of your checks. This number begins with a 0, 1, 2 or 3.

- 1 Locate the transit number
- 2 Locate the account number



### Note:

- If funds are being sent to a bank account other than the contract owner, if a check is made payable to someone other than the contact owner, or a check is sent to an address other than the address of record a Medallion Signature Guarantee for variable annuities or a Notary Public for fixed annuities is required. See below for additional information.
- If you want your RMD to be applied to another contract, form 10438 should be used each year since this can not be completed automatically through the RMD option.

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### Request for Waiver of Surrender Charges

- If confinement to a nursing home or assisted living facility applies and is not already on file at Thrivent, form 14804 (available at Thrivent.com) is also required.

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**Notification for Federal and State Income Tax Withholdings**

- Your request will be subject to Federal and State Income Tax Withholding. If no box is checked, Thrivent will automatically withhold 10% federal and any required state income tax withholding.
- Certain states require that your federal withholding election must follow what your state tax election is (e.g. if you want a percent/dollar for state tax, then you must also elect federal tax, if you do not want state tax you must also say no to federal tax withholding).
- North Carolina requires NC-4P form for no withholding, available at [Thrivent.com](http://Thrivent.com) or [www.state.nc.us](http://www.state.nc.us).

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**Medallion Signature Guarantee or Notary Public Stamp**

- A Medallion Signature Guarantee is required for Variable Annuities, and a Notary Public is required for Fixed Annuities in these situations:
  - Withdrawal amount exceeds \$100,000 (net).
  - Send proceeds by check to an address other than the address on file at Thrivent Financial.
  - Make the proceeds payable to someone other than the current owner(s).

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**Signatures**

- Signature from the owner(s) is required to complete this request.
- **Types of required signatures:**
  - **POA, guardian or conservator**
    - Signature of the POA, guardian, or conservator along with the title of legal capacity in which they are acting
    - Copy of the legal documents supporting this capacity
  - **Contract has an irrevocable beneficiary**
    - Signature of the irrevocable beneficiary (and title if applicable)
    - If funeral establishment is the beneficiary, authorization on their letterhead is required, and a copy of the pre-needs agreement
    - Signature of the owner(s)