

Bank Instructions for Distributions

IMPORTANT INFORMATION

Use this form to establish or change banking instructions if you have an existing recurring distribution (to set up a **new** recurring distribution, please submit a Distribution Request). **Please type or print.**

To ensure that your instructions are in place for your next distribution, PENSCO Trust Company (PENSCO) must receive this form with an **original Medallion Signature Guarantee** ten (10) business days prior to payment date. If we receive this form later than the scheduled payment date, or if an original Medallion Signature Guarantee is not provided, we will not be able to process your distribution request.

Note: It will take up to three (3) business days after the distribution is processed for the deposit to reach your personal bank account. If your distribution request date falls on a weekend or holiday, your request will be processed on the previous day.

1. Account Owner Information

*Account Owner Name (first, mi, last)

*Date of Birth

*PENSCO Account No.

*Social Security No.

*Mailing Address

*City

*State

*Country

*ZIP Code

*Daytime Phone No

Email Address

Check if any of the above is a new: Mailing Address Daytime Phone No. Email Address

2. Bank Instructions

Update existing schedule with new banking information

Establish wire Change wire Establish ACH Change ACH

*Financial Institution Name

*ABA No.

*Account Name

*Account No.

*Sub Account Name (wires only)

*Sub Account No. (wires only)

*Account Type: Checking Savings

*Phone No.

* Indicates required fields.

Please attach a pre-printed voided check, or deposit slip, below to avoid delays.

A pre-printed voided check is required and must be placed here.

Note: EFT instructions can only include a personal or joint account of the Account Owner. If you do not have a personal or joint account, please request this distribution to be sent via check to the address of record for the Account Owner. For Savings Accounts: Please provide a pre-printed deposit slip. Failure to attach the requested document will result in PENSCO mailing a check to the address listed in Section 1.

3. Terms & Conditions

By electing to have a distribution, my signature will constitute acknowledgment that I have read and agree to the following: I hereby authorize PENSCO to effect payment for my distribution by initiating credit entries to my account indicated at the financial institution named. I request such financial institution to accept any credit entries initiated by PENSCO to such account and to credit the same account without responsibility for the correctness thereof. I understand that such amounts will be debited as distributions from my retirement plan. I recognize that after distribution from my retirement plan for deposit to be made such account can take up to three banking days.

I understand that this authorization may be terminated (at no charge from PENSCO) by me at any time by sending written notification to both my financial institution and to PENSCO. I may direct PENSCO not less than ten (10) calendar days prior to the initiation of the credit entry.

I agree to hold PENSCO harmless from any consequences of acting in accordance with this authorization. I understand that PENSCO is not liable for the failure of a credit entry to be accepted by my financial institution.



Account Owner Signature

Date

An original Medallion Signature Guarantee is required when:

- Establishing/changing bank information
Changing address of record

ALL DOCUMENTS WITH MEDALLION SIGNATURE GUARANTEE STAMPS MUST BE MAILED TO PENSCO AND WILL NOT BE ACCEPTED VIA FAX, EMAIL OR DOCUMENT UPLOAD.

[MEDALLION GUARANTEE STAMP HERE]

Signer Name (PRINTED):

Signer Phone No.:

PENSCO Trust Company performs the duties of an independent custodian of assets for self-directed individual and business retirement accounts and does not provide investment advice, sell investments or offer any tax or legal advice. Clients or potential clients are advised to perform their own due diligence in choosing any investment opportunity as well as selecting any professional to assist them with an investment opportunity. Alternative investments are not FDIC insured and are subject to risk, including loss of principal.

INVESTMENT PRODUCTS: NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE

Send mail to: PENSCO, P.O. Box 173859, Denver, CO 80217-3859

For express deliveries: PENSCO, 1560 Broadway, Suite 400, Denver, CO 80202-3331

Questions? Call 800-962-4238, clients@pensco.com