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Roth IRA Conversion Form

WHILE WE STRIVE TO PROCESS REQUESTS IN A TIMELY AND EFFICIENT MANNER, REQUESTS MUST BE RECEIVED IN OUR OFFICE NO LATER THAN DECEMBER 20TH TO GUARANTEE PROCESSING WITHIN THE SAME TAX YEAR.

Contract Number _____ Contract Owner _____

ROTH IRA CONVERSION INFORMATION

Tax Year _____

SELECT ONE:

- Full Roth Conversion
 Partial Roth Conversion

Dollar Amount to be converted _____ Net Gross

FEDERAL/STATE WITHHOLDING INSTRUCTIONS (MUST BE COMPLETED)

Federal law requires us to withhold 10% of the taxable portion of your distribution for federal income tax. You may elect not to have federal income tax withheld or you may elect a higher withholding rate. Even if you elect not to have federal income tax withheld, you may be responsible for paying estimated taxes. You may incur penalties under the estimated tax rules if your payment of estimated tax and withholding, if any, are not sufficient to satisfy your tax liabilities.

Your distribution may also be subject to state income tax withholding. Some states require that state income tax be withheld when federal income tax is withheld. Additionally, some states have minimum withholding requirements. If you live in one of these states, we will withhold state income tax as required by your state. In other states, withholding is voluntary. If you do not make a withholding election, or if you do not specify a withholding amount, *we will withhold 10% federal income tax and will not withhold any state income tax*, unless a different amount is required by your state.

Federal Withholding Election: (Please choose one)

- I DO NOT want federal income tax withheld.
 I DO want the following federal income tax withheld: _____% federal (minimum withholding is \$10.00.)

State Withholding Election: (Please choose one)

- I DO NOT want state income tax withheld.
 I DO want the following state income tax withheld: _____% state (minimum withholding is \$10.00.)

In which state do you file your taxes? _____

STATE SPECIFIC INSTRUCTIONS:

ARIZONA residents: If you want to have Arizona taxes withheld, you must submit form A-4P.

MICHIGAN residents: If you were born after 1946, we are required to withhold state income tax from the taxable portion of your distribution, unless you elect not to withhold using form MI W-4P.

NEW YORK residents: If you want to have New York state taxes withheld, you must submit form IT-2104-P. Withholding is only permitted on periodic payments payable over a period of longer than one year.

Please consult a tax advisor for more information on withholding requirements for your state.

