EAGLELIFE® INSURANCE COMPANY

Eagle Life Insurance Company®

Roth IRA Conversion Form

P.O. Box 71279, Des Moines, IA 50325-0279
O/N Address: 6000 Westown Parkway, West Des Moines IA, 50266
866-526-0995 • Fax 515-457-1911
www.eagle-lifeco.com • service@eagle-lifeco.com

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 INFOR	MATION	
Tax Year		
SELECT ONE:		
☐ Full Roth Conversion		
☐ Partial Roth Conversion		
_	erted	
· · · · · · · · · · · · · · · · · · ·	IG INSTRUCTIONS (MUST BE COMPLETED)	
not to have federal income tax withhel income tax withheld, you may be respo	% of the taxable portion of your distribution for federal income tax. You may elect d or you may elect a higher withholding rate. Even if you elect not to have federal onsible for paying estimated taxes. You may incur penalties under the 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		
I <u>DO NOT</u> want federal income ta		
☐ I DO want the following federal ir	ncome tax withheld:% federal (minimum withholding is \$10.00.)	
State Withholding Election: (Please		
\square I <u>DO NOT</u> want state income tax v		
_	ome tax withheld:% state (minimum withholding is \$10.00.)	
	?	
STATE SPECIFIC INSTRUCTIONS:		
· ·	ve Arizona taxes withheld, you must submit form A-4P.	
MICHIGAN residents: If you were bor of your distribution, unless you elect no	n after 1946, we are required to withhold state income tax from the taxable portion of to withhold using form MI W-4P.	
	have New York state taxes withheld, you must submit form IT-2104-P. Withholding is ayable over a period of longer than one year.	
Please consult a tay advisor for more in	formation on withholding requirements for your state	

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IAX PAYER IDENTIFICATION NOT	MBER (MUST BE COMPLETED)		
OR			
Social Security Number	Employer Identification Number		
CONSENT OF SPOUSE - REQUIRED IF YOU RESIDE IN AZ, CA, ID, LA, NM, NV, TX, WA, OR WI			
If you are married and reside in one of the states listed above, or a community property interest otherwise exists, your spouse must consent to this transaction by signing below.			
, , , , , , , , , , , , , , , , , , ,	action by organize determine		
X			
Spouse Signature	Date		
We are entitled to rely on the information you provide in this section. If you do not indicate that you are married, we are entitled to rely on our good faith belief that no community property interest exists. If you are unsure of whether a community property interest exists, consult your legal advisor. We have no responsibility for determining the applicability of community property laws or the validity of the requested transaction. If you live in one of the states listed above and you do not complete this section, we will assume you are not married and no community property interest exists. By signing this form, you are certifying that the information provided in this section is true.			
TAX IDENTIFICATION CERTIFICATION (SUBSTITUTE W-9)			
Under penalties of perjury, I certify that: 1. My Social Security number or taxpayer identification number shown on this form is correct; 2. I am not subject to backup withholding due to failure to report interest or dividend income; 3. I am a U.S. citizen or other U.S. person (as defined in the W-9 instructions); and 4. I am not subject to FATCA reporting because I am a U.S. person and the account is located within the United States. Certification Instructions – You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest or dividends on your tax return. If you are not a U.S. citizen or other U.S. person for tax purposes, please cross out certifications 3 and 4 and complete and return to us the appropriate IRS documentation.			
PLEASE SIGN & DATE BELOW			
The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.			
I acknowledge by signing this form that converting all or part of the above named IRA to a Roth IRA conversion will create a taxable event for the year of election. A 1099-R reporting the elected conversion amount as taxable will be sent out for the year in which election was made. I understand that the provisions governing Roth IRAs in the Individual Retirement Annuity Endorsement and Disclosure will apply to my annuity contract.			
X			
Owner's Signature*	Date		
*If you are signing on behalf of the owner, please indicate the capacity in which you are signing:			
☐ Trustee ☐ Attorney-in-Fact ☐ Conservator/guardian ☐ Other:			