



**American Equity Investment
Life Insurance Company of New York**

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**Qualified Charitable
Distribution Form**

Instructions

Complete this form every time you wish to begin Qualified Charitable Distribution (“QCD”) payments from any traditional, Roth, inactive SIMPLE, inactive SEP, or Inherited IRA.

If you do not have an active Required Minimum Distribution (RMD) request on file, you will also need to complete our RMD form (Form #064083) to elect RMD payments.

In processing this request, we will:

- Report the payment as a taxable distribution to you;
- Make the check payable to the charity and mail it directly to you; however, we will not verify or assert this charity is a “qualified charity” as determined by the applicable laws, rules, or regulations;
- Process this request only if you are 70½ years of age at the time of the distribution; and
- Not withhold any taxes from the distribution.

By completing this form, you:

- Acknowledge the transaction will be reported as a taxable distribution to you;
- Acknowledge your RMD payments will continue to be made payable to the charity until you inform us otherwise in writing;
- Contact the charity directly if you wish to receive a receipt for your donation;
- Agree to indemnify us from any liability for any failure to meet IRS QCD requirements; and
- Confirm you are a U.S. person or have a U.S. tax-filing requirement.

We do not provide tax advice. Consider consulting a tax advisor to discuss your specific scenario and any additional guidance you believe is necessary.

**Qualified Charitable
Distribution Form**
IRA RMD

By completing this form, I am authorizing American Equity of New York to make all requested payments payable to the charity named below.

Name of Charity		

Mailing Address		
_____	_____	_____
City	State	Zip

We will forward your RMD payments to you made payable to the above-named charity until you instruct us in writing otherwise.

Annuity Contract/Certificate Number		
_____	_____	_____
Owner's Signature	Date	Phone Number