



Individual 401(k) Distribution Request Form

CLEAR

PRINT

www.schwab.com 1-800-435-4000 (inside the U.S.) +1-415-667-8400 (outside the U.S.) 1-888-686-6916 (multilingual services)

Clients of Investment Advisors: Contact your advisor directly or call Schwab Alliance at 1-800-515-2157.

1. Account Holder Information (Required)

Name First _____ Middle _____ Last _____

Schwab Account Number _____ Social Security Number _____ Telephone Number _____

2. Employer Information (Required)

Employer Name _____ Employer Identification Number (EIN) _____

3. Distribution Reason
Choose one.

Normal Retirement Age
Age 59½ or older

Termination of Employment

In-Service Withdrawal: Two-Year Rule
Select for a withdrawal of vested Employer contributions (not including Elective Salary Deferrals) that have been in the Plan for at least two full Plan years (24 months). See Section 5.01(C)(1) of the Basic Plan Document.

In-Service Withdrawal: Five-Year Rule
Select for a withdrawal of vested account balance (not including Elective Salary Deferrals and allocable income) if you have participated in the Plan for at least five years (60 months). See Section 5.01(C)(1) of the Basic Plan Document.

Disability
Permanent disability within the meaning of IRS Section 72(m)(7). Consult your tax advisor.

Hardship
Select for Distribution Due to Hardship as described in the Basic Plan Document, Section 5.01(C)(2). Available only if your plan's Adoption Agreement permits hardship distributions. Note: Hardship distributions are not eligible for rollovers.

Plan Termination

Distribution of Rollover Contribution
This distribution reason is **only** for rollover assets or transferred assets that were previously rolled into this account. Caution: This is only a distribution reason for previously rolled over assets or transferred assets from an outside plan and does not allow for distributions of employer or salary deferral contributions from this account.

Death
Attach the following documents and complete the recipient information requested below.

1. Certified copy of the death certificate
2. Individual 401(k) Account Application (You must first open an Individual 401(k) account in your name for tax reporting purposes.)
3. Inherited IRA Account Application (required if rolling over to a Schwab Inherited IRA)
4. If there are multiple beneficiaries, each beneficiary must complete a separate Individual 401(k) Distribution Request Form.

Note: Other documents may be required. Call Schwab Estate Distribution Services at 1-888-297-0244 to discuss your individual situation.

Distribution Direct Rollover Request 401 K Plan

SJ Ball



Distribution Direct Rollover Request 401 K Plan:

Whispering the Strategies of Language: An Psychological Quest through **Distribution Direct Rollover Request 401 K Plan**

In a digitally-driven earth where displays reign great and immediate conversation drowns out the subtleties of language, the profound techniques and emotional subtleties hidden within phrases frequently get unheard. Yet, situated within the pages of **Distribution Direct Rollover Request 401 K Plan** a interesting literary value pulsating with fresh thoughts, lies an extraordinary quest waiting to be undertaken. Published by a talented wordsmith, that marvelous opus encourages visitors on an introspective journey, lightly unraveling the veiled truths and profound impact resonating within ab muscles fabric of every word. Within the emotional depths with this moving evaluation, we will embark upon a sincere exploration of the book is key themes, dissect their interesting writing design, and succumb to the effective resonance it evokes strong within the recesses of readers hearts.

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Distribution Direct Rollover Request 401 K Plan Introduction

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