

# **INCOME DISTRIBUTION REQUEST FORM**

# **Bluerock Asset Management**

### Please Print or Type IMPORTANT INFORMATION

Each alternative investment has specific rules around income distributions, please review the terms and conditions outlined within the specific product prospectus for details.

This form is not for withdrawal requests.

Forward To: First Trust Retirement, c/o SS&C

Regular Mail

PO Box 219445

Kansas City, MO 64121-9445

Mail Stop: Bluerock
430 West 7th Street

855-387-3847 Kansas City, MO 64105-1407

Step 1: IRA OWNER INFORMATION			
IRA Owner Name	Social Security Number	Date of Birth	FTR Account Number (If Applicable)
		2000 01 2	(
	0: /c: / /z:		DI N I
Address Step 2: PRODUCT SELECTION	City/State/Zip	Email	Phone Number
Bluerock Total Income + Real Estate *			
Bluefock Fotal meome - Real Estate			
*Income distributions for Bluerock Asset Management are processed in accordance with their respective distribution programs and are subject to			
availability. Please review their prospectuses for frequency and availability details or call Bluerock Asset Management at 844-819-8287.			
, , , , , , , , , , , , , , , , , , , ,	rust Retirement to pay out my inc	come distributions. Please select	distribution type in step 3 and payment method in
Step 4.			
To participate in the Distribution Reinvestmen	t Plan (DRP), it must be indicated	on the applicable Subscription Ag	greement or product sponsor update form.
Step 3: INCOME DISTRIBUTION INSTRUCTIONS			
☐ Traditional IRA ☐	Roth IRA	SEP IRA	Beneficiary IRA
Premature Distribution (Account holder	must be under age 59 ½ - IRS pena	alty applies unless rollover occurs v	within 60 days)
Premature Exempt Distribution (Including Permanent Disability, SEPP, and other identified 72 (t) qualified exceptions. (Documentary evidence required)			
Normal Distribution (Account holder age 59 ½ or over)			
Death Distribution (If not already in a Beneficiary IRA; Must provide a certified copy of the account holder's Death Certificate)			
IRA Trustee to Trustee Transfer Please note that if requesting an IRA Trustee transfer you need to contact the accepting custodian and complete their			
transfer (TOA) paperwork. A Medallion	Signature Guarantee stamp may	be required on their transfer form	n.
Step 4: PAYMENT METHOD Taxable Options:			
	on file (Sianature Guarantee requir	red if address changed within 30 d	avs.)
<ul> <li>Mail check to the address currently on file (Signature Guarantee required if address changed within 30 days.)</li> <li>Electronically transfer funds by ACH to my bank (Voided check is required for new instructions. Signature Guarantee required if adding bank within 30 days</li> </ul>			
Mail check to a third party listed belo	OW.		
Non-Taxable Options:			
Deposit cash into my Undirected Cas	sh Account		
Transfer my income distributions to the custodian listed below as a Trustee to Trustee Transfer			
For a Trustee to Trustee transfer, this form must be signed and Signature Guaranteed by accepting custodian OR must include the custodian's signed Letter of Acceptance. This custodial sign off is only required at time of distribution establishment. Please note that this form cannot be notarized.			
Letter of Acceptance. This custodial	sign off is only required at time o	of distribution establishment. Plea	ise note that this form cannot be notarized.
Payee or Account Name			
Account Number			
C. LALL			
Street Address			
City, State & ZIP		Sia	gnature Guarantee
••			



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#### Step 5: INCOME TAX WITHHOLDING (THIS SECTION MUST BE COMPLETED\*) (Form W-4/OMB No. 1545-0415)

\* Except for a distribution from a Roth IRA or for a return of excess contribution.

In compliance with the "Tax Equity and Fiscal Responsibility Act," First Trust Retirement, as custodian, is required to withhold Federal Income Tax from all IRA distributions. You may exercise your right to elect not to have funds withheld. This election will be in effect until you change it. You may change or revoke this election at any time and as often as you wish. You may elect out of this withholding by checking the appropriate box below. Please note that penalties may be incurred under the estimated tax rules if your withholding and/or estimated tax payments are not sufficient.

If no election is made, First Trust Retirement is required to withhold 10% Federal Income Tax. State Income Taxes cannot be withheld from your distribution.

Do not withhold taxes.

Withhold \_\_\_\_\_\_ % from the amount withdrawn (must be at least 10%).

Step 6: SIGNATURE REQUIRED

By signing below, I certify that the information I have provided is true and correct, and I authorize the Custodian to distribute my IRA as instructed above.

IRA Owner Signature(or other authorized person\*)

Date

\* If signing as Power of Attorney, valid POA documents must be included.