

## INCOME DISTRIBUTION REQUEST FORM Invesco INREIT

Please Print or Type		Forward To: First Trust Retirement, c/o SS&C		
	has specific rules around income distributions, please review lined within the specific product prospectus for details.	<u>Regular Mail</u> PO Box 219164 Kansas City, MO 64121-9164	<u>Overnight Delivery</u> Mail Stop: Invesco INREIT 430 West 7th Street	
This form is not for withdraw	val requests.	855-387-3847	Kansas City, MO 64105-1407	
Step 1: IRA OWNER INFORM	IATION			
IRA Owner Name	Social Security Number	Date of Birth	FTR Account Number (If Applicable)	
Address Step 2: PRODUCT SELECTION	City/State/Zip	Email	Phone Number	
Invesco Real Estate Inc				
	esco INREIT are processed in accordance with their respective		t to availability. Please	
	frequency and availability details or call Invesco INREIT at 83		turns in stars 2 and use most weather dim	
Step 4.	requesting First Trust Retirement to pay out my income di	stributions. Please select distribution	type in step 3 and payment method in	
To participate in the Distribu Step 3: INCOME DISTRIBUTION	tion Reinvestment Plan (DRP), it must be indicated on the a ON INSTRUCTIONS	applicable Subscription Agreement or	product sponsor update form.	
Traditional IRA	🗌 Roth IRA 🗌	SEP IRA	Beneficiary IRA	
Premature Distribution	${ m \underline{n}}$ (Account holder must be under age 59 ½ - IRS penalty appl	lies unless rollover occurs within 60 da	ys)	
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.				
Step 4: PAYMENT METHOD	vork. A Medallion Signature Guarantee Stamp may be requ	nred on their transfer form.		
Taxable Options:				
Mail check to the address currently on file (Signature Guarantee required if address changed within 30 days.)				
Electronically transfer funds by ACH to my bank (Voided check is required for new instructions. Signature Guarantee required if adding bank within 30 days				
Mail check to a third party listed below.				
Non-Taxable Options:				
Deposit cash into my Undirected Cash Account				
Transfer my incom	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 Acceptar	ice. This custodial sign of its only required at time of distric	fution establishment. Please note tha		
Payee or Account Name				
Account Number				
Street Address				
City, State & ZIP		Signature Gua	Signature Guarantee	



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