

IRA WITHDRAWAL/RMD FORM Lightstone Real Estate Investments

Please Print or Type

This form should be used by the IRA owner or owner of a Beneficiary IRA to request distributions from the account.

This form should be reviewed and completed with the assistance of a financial or tax advisor.

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

<u>Regular Mail</u>

<u>Overnight Delivery</u>

PO Box 219002 Mail Stop: Lightstone Group REIT

Kansas City, MO 64121-9002 430 West 7th Street

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

Step 1: IRA OWNER INFORMATION				
IRA Owner Name/Beneficiary Name*	Social Security Nur	mber* Date of Birth*	FTR Account Number (If Applicable)	
	0: 10: 17: *	- "		
Address*	City/State/Zip*	Email	Phone Number*	
*If completing for a death distribution, please p	rovide the beneficiary informat	ion in this section. A Certified Copy of	of the Death Certificate is required.	
Step 2: PRODUCT SELECTION				
Lightstone Value Plus Real Estate Investment Tru	st, Inc.* \coprod Lightstone Value	Plus Real Estate Investment Trust II, Inc.*	Lightstone Real Estate Income Trust, Inc.*	
Lightstone Value Plus Real Estate Investment Tru	st III, Inc.* Lightstone Value	Plus Real REIT V, Inc.*	☐ Undirected Cash Account**	
*Redemptions for Lightstone Group REIT are processed in accordance with their respective Share Redemption Programs and are subject the availability. Please				
review the prospectuses for details or call Lightstone Group REIT at 888-808-7348. **The interest rate and annual percentage yield may change at any time. Interest will be compounded and credited on the last day of each calendar month. The				
daily balance method is used to calculate the inte				
Step 3: ONE TIME WITHDRAWAL INSTRUCTIONS		e bank deposit is insured up to applic	able FDIC IIIIIIts.	
·	☐ Roth IRA	CED IDA	□ Beneficion: IBA	
☐ Traditional IRA	□ ROTH IRA	☐ SEP IRA	☐ Beneficiary IRA	
Redeem ENTIRE account				
☐ Redeem PARTIAL amount of \$	or	shares from account		
Step 4: ONE TIME WITHDRAWAL DISTRIBUTION	REASON			
Premature Distribution (Account holder mu	st be under age 59 ½ - IRS penal	ty applies unless rollover occurs witl	nin 60 days)	
Premature Exempt Distribution (Including P	ermanent Disability, SEPP, and o	other identified 72 (t) qualified excep	otions.)	
Normal Distribution (Account holder age 59	% or over)		•	
Death Distribution (If not already in a Beneficiary IRA; Must provide a certified copy of the account holder's Death Certificate)				
Return of Excess Contribution Amount \$	*			
☐ Current Year ☐ F	Prior Year			
Recharacterization Amount \$	*			
☐ Current Year ☐ I	Prior Year			
Direct Roth IRA Conversion Amount \$				
IRA Trustee to Trustee Transfer Liquidate and move proceeds to Undirected Cash account (Proceeds will be deposited in Undirected Cash account until the				
TOA paperwork is received) 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.				
*Deadline to recharacterize a contribution or remove an excess contribution is the IRA Owner's tax filing deadline (for the tax year of the contribution), plus any				
extensions including an automatic 6-month exte	nsion for those who file by the to	ax deadline.		
Step 5: RMD INSTRUCTIONS				
☐ Traditional IRA	☐ SEP IRA	☐ Beneficiary	IRA (Must complete step 6)	
One-time (year) RM				
Custodian Calculated	(year) RMD			
Step 6: BENEFICIARY IRA RMD OPTIONS (CONTI	NUED ON PAGE 2)			
Required minimum distributions (RMDs) H	AD NOT started for the original	/deceased account holder.		
Please select one of the following options:				
Lump Sum (I wish to receive the distribution in a single lump-sum payment)				
+5 years (I wish to take distributions over a five-year period)				
<u> </u>				
7				
If you are the spouse of the original account owner, you may elect to have your life expectancy recalculated each year. Please select one:				
☐ Recalculated each year				





Ste	o 6: BENEFICIARY IRA RMD OPTIONS (CONTINUED FROM PAGE 1)
	Required minimum distributions (RMDs) HAD started for the original/deceased account holder.
Plea	ase select one of the following options:
	I wish to take distributions based on the oldest beneficiary's life expectancy. (If you are the oldest beneficiary, your LE will be used)
	I wish to continue taking distributions in the manner elected by the original account owner
Req	uired information for Beneficiary RMD Calculation:
	Name of prior participant/account owner:
	Date of death of prior participant/account owner:
	Date of birth of prior participant/account owner:
Surv	viving spouse. If a surviving spouse, register my IRA:
	As a Beneficiary IRA
	In my name (not a Beneficiary IRA)
A no	on-spousal beneficiary (for non-spousal beneficiary, account will be registered as a Beneficiary IRA).
	I am the oldest beneficiary of this IRA.
	I am not the oldest beneficiary of this IRA. Date of Birth of Oldest Beneficiary:
	Date of Birth of Oldest Beneficiary.
	o 7: PAYMENT METHOD
Tax	able Options:
	Transfer in Kind my shares to my non-qualified account; Existing Account Number Create New Account (Submit new subscription document if non-qualified account does not exist. See product prospectus for requirements.) 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. Form must be signed and Signature Guaranteed for this payment method. Please note that this form cannot be notarized.
Nor	n-Taxable Options:
	Deposit cash into my Undirected Cash Account
	Transfer in Kind my IRA; Existing Account Number
_	☐ Create New Account (Must complete an IRA Application to create a new account for Recharacterization or Roth Conversions)
	a cleate New Account (wast complete an inversibility of the account for Account of New Account (wast complete an inversions)
Pay	ee or Account Name
Acc	ount Number
Chira	and Address.
stre	eet Address
	1
Citv	, State & ZIP Signature Guarantee
- 1	



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Step 8: 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. Please note that withholding cannot be done for Transfers-in-Kind or Transfers to Non-Qualified accounts. 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. % from the amount withdrawn (must be at least 10%). Withhold **Step 9: SUBSTITUTE W-9** I HEREBY CERTIFY under penalty of perjury (i) that the taxpayer identification number shown on the Transfer Agreement is true, correct and complete, (ii) that I am not subject to backup withholding either because I have not been notified that I am subject to backup withholding as a result of a failure to report all interest or distributions, or the Internal Revenue Service has notified me that I am no longer subject to backup withholding, and (iii) I am a U.S. person. **Step 10: 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

Date

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