

INCOME DISTRIBUTION REQUEST FORM Penn Square IV U.S. Real Estate Fund

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 Overnight Delivery
PO Box 219047 Mail Stop: Penn Square
Kansas City, MO 64121-9047 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)	
IIA Owner Name	Social Security Number	Date of Birtin	Tit Account Number (ii Applicable)	
Address Story 2: PROPUST SELECTION	City/State/Zip	Email	Phone Number	
Step 2: PRODUCT SELECTION				
Penn Square IV U.S. Real Estat	e Fund*			
*In a constant distributions for Door Course	a NAME Con February Front and any agreement in the			
-	e IV O.S. Real Estate Fund are processed in act frequency and availability details or call Penn S	•	tribution programs and are subject to availability.	
	• •	•	distribution type in step 3 and payment method in	
Step 4.	ang i not must nether to pay out my me	one distributions. Flease select	and payment meaned in	
	investment Plan (DRP), it must be indicated o	on the applicable Subscription Ag	greement or product sponsor update form.	
Step 3: INCOME DISTRIBUTION INST				
☐ Traditional IRA	☐ Roth IRA	SEP IRA	Beneficiary IRA	
Premature Distribution (Accou	ınt holder must be under age 59 $\%$ - IRS penal	ty 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 Transfe	$rac{\partial \mathbf{r}}{\partial \mathbf{r}}$ Please note that if requesting an IRA Trusto	ee transfer you need to contact t	he accepting custodian and complete their	
	Medallion Signature Guarantee stamp may l	be required on their transfer forn	n.	
Step 4: PAYMENT METHOD Taxable Options:				
	currently on file (Signature Guarantee require	ed if address chanaed within 30 d	aus)	
 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 				
		ea for new instructions. Signature	e Guarantee required if adding bank within 30 days,	
Mail check to a third party	risted below.			
Non-Taxable Options:				
Deposit cash into my Undi	rected Cash Account			
Transfer my income distributions to the custodian listed below as a Trustee to Trustee Transfer				
			todian OR must include the custodian's signed	
Letter of Acceptance. This	s custodial sign off is only required at time of	distribution establishment. Plea	se note that this form cannot be notarized.	
Payee or Account Name				
Tayee of Account Name				
Account Number				
Street Address				
City, State & ZIP		Sig	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