

## INCOME DISTRIBUTION REQUEST FORM Sierra Income Corporation

## 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 219731 Mail Stop: Sierra
Kansas City, MO 64121-9731 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)
not owner rame	Social Security Hamber	Date of Birth	Titt/teedane Namber (II/Applicable)
Address	C': /C/7'	E	Dhara Nasahar
Address Step 2: PRODUCT SELECTION	City/State/Zip	Email	Phone Number
Sierra Income Corporation ("SIC")*	Sierra Total Retu	ırn Fund ("STRF")*	
*Income distributions for Sierra Income Corporation 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 Sierra Income Corporation at 888-292-3178.			
By submitting this form I am requesting First Trust Retirement to pay out my income distributions. Please select distribution type in step 3 and payment method i			
Step 4.	irust ketirement to pay out my n	icome distributions. Flease select	distribution type in step 5 and payment method i
To participate in the Distribution Reinvestmen		d on the applicable Subscription A	greement or product sponsor update form.
Step 3: INCOME DISTRIBUTION INSTRUCTION  Traditional IRA	Roth IRA	SEP IRA	☐ Beneficiary IRA
			·
Premature Distribution (Account holder must be under age 59 ½ - IRS penalty applies unless rollover occurs within 60 days)  Promature Example Distribution (Including Permanent Distribution (Including Permanent Distribution (Including Permanent Distribution))			
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	,	,	
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 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 custodia	I sign off is only required at time	of distribution establishment. Plea	ase note that this form cannot be notarized.
Payee or Account Name			
,			
Account Number			<b>I</b>
C) AALI			<b>I</b>
Street Address			<b>I</b>
			<b>I</b>
City, State & ZIP		Si	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

IRA Owner Signature(or other authorized person\*)
\* If signing as Power of Attorney, valid POA documents must be included.

6/2019