

INCOME DISTRIBUTION REQUEST FORM Wildermuth Endowment 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 219030 Mail Stop: Wildermuth

Kansas City, MO 64121-9030 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)
Address	City/State/Zip	Email	Phone Number
Step 2: PRODUCT SELECTION			
Wildermuth Endowment Fund*	Undirected Cash	Account	
*Income distributions for Wildermuth	Endowment Funds are processed in accord	lance with their respective distributi	ion programs and are subject to
availability. Please review their prospe	ectuses for frequency and availability detail	ls or call Wildermuth Endowment Fu	und at 888-445-6032.
	ng First Trust Retirement to pay out my in	ncome distributions. Please select	distribution type in step 3 and payment method i
Step 4.			
		d on the applicable Subscription Aջ	greement or product sponsor update form.
Step 3: INCOME DISTRIBUTION INSTE	RUCTIONS Roth IRA	☐ SEP IRA	Ponoficiary IPA
			Beneficiary IRA
	nt holder must be under age 59 ½ - IRS per		
Premature Exempt Distribution (Including Permanent Disability, SEPP, and other identified 72 (t) qualified exceptions. (Documentary evidence required)			
Normal Distribution (Account h	,		
Death Distribution (If not already in a Beneficiary IRA; Must provide a certified copy of the account holder's Death Certificate)			
	Please note that if requesting an IRA Tru Medallion Signature Guarantee stamp ma		he accepting custodian and complete their
Step 4: PAYMENT METHOD	nedamon signature Guarantee stamp ma	y be required on their transjer jorn	11.
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 Undir	ected 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			
			ase note that this form cannot be notarized.
Payee or Account Name			
Account Number			
Street Address			.
			.
C': C: 1 0 710			
City, State & ZIP		Sig	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*)
* If signing as Power of Attorney, valid POA documents must be included.

Date