

Use this form to setup your Required Minimum Distribution “RMD”, 72(T) distribution, or systematic withdrawal on a Traditional, Roth, Inherited, Rollover, SEP- or SIMPLE IRA at BlackRock.

- ▶ For one-time distributions from an IRA, please use our IRA Distribution Request Form.
- ▶ Consult your financial advisor or tax professional with any questions about the taxability of IRA withdrawals.

Mail this application, along with any other required documents, to:


**Regular mail**

BlackRock Funds  
P.O. Box 9819  
Providence, RI 02940

**Overnight mail**

BlackRock Funds  
4400 Computer Drive  
Westborough, MA 01581

**Fax: (508) 599-1788**

 **Questions?** Call us at 1-800-441-7762, Monday through Friday between 8:00 AM and 6:00 PM ET or visit us online at [www.blackrock.com](http://www.blackrock.com).

### 1. Current Account Information

First, please tell us about the account(s) that you wish to request the redemption from:

\_\_\_\_\_

Full name of primary account owner

\_\_\_\_\_

Contact telephone number

\_\_\_\_\_

Social Security Number

\_\_\_\_\_

BlackRock account number(s)

\_\_\_\_\_

Reference number (if applicable)

### 2a. Distribution Election

To help ensure your distribution is processed correctly and is reported to the IRS properly, please complete this section to tell us more about the type of distribution.

#### Required Minimum Distributions

- Required Minimum Distributions (“RMD”) – IRA Owner has reached the age of 70 ½, complete **section 2b**.
- Required Minimum Distributions (“RMD”) – Inherited IRA, complete **section 2b**.

#### Other Distributions

- Dividend and or Capital Gains** distributions to be paid in cash, complete **section 2c**.
- Systematic Distribution** that is not RMD, 72(t), or (72m)(7), complete **section 2c**.
- Substantially equal periodic payments** within the meaning of section **72(t)** of the Internal Revenue Code, complete **section 2c**.
- Permanent Disability** – You certify that you are disabled within the meaning of 72(m)(7) of the Internal Revenue Code (An individual shall be considered disabled if he/she is unable to engage in any substantial gainful activity by reason of any medically determinable physical or mental impairment which can be expected to result in death or to be of long-continued and indefinite duration), complete **section 2c**.

## 2b. Required Minimum Distributions (“RMD”)

The IRS requires you to begin taking distributions from your Traditional IRA, Rollover IRA, SEP IRA or SIMPLE IRA once you have reached the age of 70½. These “Required Minimum Distributions”, or “RMD”, must begin by April 1st of the year following the year in which you turn 70½. Please note: There is no RMD on Roth IRAs. **Before you make any decision regarding your RMD, we urge you to consult your financial advisor or tax advisor.**

The Required Minimum Distribution (RMD) amount is determined by Internal Revenue Service (IRS) regulations. These regulations are explained in IRS Publication 590, Individual Retirement Arrangements (IRAs), which incorporate updated Life Expectancy Tables. Each RMD will be calculated based on the Uniform Lifetime Table, unless the following exception applies to you and you have indicated so by checking the box below.

- My sole primary beneficiary (indicated below) is my spouse who is more than 10 years younger than I am. I elect to calculate the RMD based on the life expectancy from the Joint and Last Survivor Table.**

\_\_\_\_\_ %  
Full name of Primary Beneficiary      Date of birth (mm/dd/yyyy)      Percentage

Tell us how you would like us to distribute your RMD payments:

- Please begin my RMD on \_\_\_\_\_ OR  Please start Immediately For tax year: \_\_\_\_\_  
Date (mm/dd/yyyy)

**A)** If you would like us to calculate the amount of your Required Minimum Distributions, and establish a systematic withdrawal based on that amount, we will need several pieces of information. Once this option has been established on your account, we will automatically re-calculate the RMD each subsequent year.

- Calculate and distribute my RMD with the frequency and allocation in **Section 3**.
- AND re-calculate my RMD each year going forward.

**B)** If you would prefer a fixed dollar amount or a percentage (instead of having BlackRock calculate your RMD), please complete below. Please be sure that the amount you request is enough to meet your RMD for the year. NOTE: We will NOT re-calculate your RMD each subsequent year.

- Redeem this fixed dollar amount \$ \_\_\_\_\_ with the frequency and allocation in **Section 3**.

## 2c. Other Distribution Types

Please check the appropriate box or box(es) and complete any required field(s). If you would like to close one or more of the funds within your account, please indicate “100%” in the amount field. Due to market fluctuations, attempting to estimate the redemption amount may cause a delay in processing or leave a remainder in the fund.

- Send my dividends and/or capital gains to me via cash:  Dividends  Capital Gains
- Systematic Distributions (**NOT including “RMD”**) in the amount of \$ \_\_\_\_\_ to begin on \_\_\_\_\_.  
Date (mm/dd/yyyy)
- 72(t) (Substantially Equal Periodic Payments) Distributions in the amount of \$ \_\_\_\_\_ OR calculated under the RMD method using to begin on \_\_\_\_\_.  
Date (mm/dd/yyyy)
- Uniform Lifetime Table  Single Life Table  Joint and Last Survivor Table
- 72(m)(7) Distributions in the amount of \$ \_\_\_\_\_ to begin on \_\_\_\_\_.  
Date (mm/dd/yyyy)



## 5. Delivery Instructions

Complete the section below to tell us where to send your distributions to.

- Send the distribution via check to my mailing address of record by.
- Send proceeds to my bank account by:  **ACH** (No Fee. Arrives within 48-72 hours.)  
 **Wire** (\$7.50 per fund. Received next business day.)
- I am completing the section below to add new bank instructions not on file.

In addition to completing the section below please **attach a bank statement, voided check, or savings deposit slip (showing the bank account number & registration)**. Your bank may have a different ABA # for wires, and maybe charged an additional fee to receive the wire. Set up same as other bank info sections

_____ Name of Bank	_____ ABA routing number (9 digits)
_____ Full name of bank account owner	_____ Account number at your bank
_____ Full name of joint bank account owner	<input type="checkbox"/> Checking <input type="checkbox"/> Savings

**Please Note:** New bank instructions will go through a 10-business day pre-note period. If you are planning on redeeming immediately or with in the pre-note period, a Medallion Signature Guarantee stamp on your signature in section 7 will be required to process this form.

## 6. Signature and Authorization

Under penalties of perjury, I hereby attest that the above and the following facts are true and correct.

### I acknowledge that:

- ▶ I am authorized to make these elections and that all information provided is true and accurate.
- ▶ That no tax or legal advice has been given to me by the Custodian (BNY Mellon Asset Servicing, Inc.), the Fund, or any agent of either of them, and that all decisions regarding the elections made on this form are my own.
- ▶ The Custodian is authorized to distribute funds from my account in the manner requested. The Fund may conclusively rely on this certification and authorization without further investigation or inquiry.
- ▶ I assume responsibility for any adverse consequences that may arise from the election(s) and agree that the Fund and their agents shall in no way be responsible, and shall be indemnified and held harmless, for any tax, legal or other consequences of the election(s) made on this form.



\_\_\_\_\_  
Signature of IRA owner / trustee / guardian / custodian etc.

\_\_\_\_\_  
Title / Capacity (if any)

\_\_\_\_\_  
Date (mm/dd/yyyy)

*Place any notary seal or  
Medallion Signature Guarantee  
stamp here*



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### Not FDIC Insured | May Lose Value | No Bank Guarantee

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