



## 4 Provide RMD Instructions (if applicable)

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If you have reached the starting age for required minimum distributions (RMDs), please review the information below. RMD funds cannot be included in your rollover to the QRP.

**We will issue a check payable to you for your current year RMD amount (or the remaining amount, if you have already withdrawn a portion) unless you mark the box below.**

I have withdrawn (or will withdraw) the American Century Investments portion of my annual RMD from an IRA at another financial institution. Please proceed with the direct rollover without removing the RMD.

**Notice of Withholding:** The RMD amount distributed from your IRA may be fully or partly taxable. If you do not have income tax withheld from your RMD payment, or if you don't have enough withheld, you may be responsible for payment of estimated tax. You may incur penalties under the estimated tax rules if your withholding and estimated tax payments are not sufficient.

**If you want to have federal income tax withheld from the RMD payment, indicate the percentage to withhold (minimum 10%): \_\_\_\_\_%\***

*\*If left blank, we will not withhold federal income tax. If you indicate 1-9%, we will default to 10% withholding. State tax will be withheld if, at the time of your distribution, your address is within one of the mandatory withholding states.*

## 5 Provide Your Signature

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By signing this form, I certify that:

- I intend to roll over my IRA assets to the qualified retirement plan (QRP) designated above.
- I have confirmed that the QRP will accept the IRA monies as a direct rollover.
- I understand that American Century Services, LLC (American Century) will code the distribution as a direct rollover, distribute the RMD to me if applicable (unless I have elected not to have the RMD paid to me), and generate an IRS Form 1099-R to me and the IRS by January 31 of the year following the year in which the direct rollover was completed.
- I understand that American Century will have no responsibility for any tax consequences that occur if the monies are ineligible for rollover and/or the QRP rejects the direct rollover. I also agree to defend, hold harmless and indemnify American Century and its officers, agents, employees, affiliates and successors from liability for any loss, claim or expense that I may sustain as a result of their acting on my instructions contained in this form.



\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date signed

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