



# IRA WITHHOLDING ELECTION CHANGE FORM

**Overnight Delivery:**  
Paydenfunds  
803 W. Michigan St., Suite A  
Milwaukee, WI 53233-2301

**Regular Mail:**  
Paydenfunds  
P.O. Box 1611  
Milwaukee, WI 53201-1611

Please complete the following form if you wish to change your tax withholding elections on your IRA account.  
Complete a separate form for each Paydenfunds IRA account type (e.g., IRA, SEP-IRA).

## 1. ACCOUNT INFORMATION

Name of Shareholder \_\_\_\_\_ Social Security Number \_\_\_\_\_

Account Number \_\_\_\_\_

Name (if the election is for the entire IRA and not fund specific, leave blank or write "ALL") \_\_\_\_\_

Daytime Phone Number \_\_\_\_\_ Evening Phone Number \_\_\_\_\_

Type of account (select only one):  Traditional/Rollover IRA  SEP-IRA  Roth IRA

## 2. WITHHOLDING DISCLOSURE (Substitute W-4P)

The distribution(s) you receive from your Paydenfunds retirement account are subject to federal income tax withholding at a rate of 10% unless you elect not to have withholding apply. Withholding will only apply to the total amount of the distribution, whether taxable or not. You may elect not to have withholding apply to you. If you do not make an election by the date of your distribution, federal income tax will be withheld from the distribution. If you elect not to have withholding apply to your distribution payments, or if you do not have enough federal income tax withheld from your distribution, 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. The withholding election below will be applied to all distributions from this account from this date forward including any Systematic Withdrawal Plans you currently have in place. You may change your withholding election for future distributions by completing a new IRA Withholding Election Change Form.

- Please withhold 10% federal income tax from my distribution.
- Please withhold \_\_\_\_\_% (greater than 10%) federal income tax from my distribution.
- Please do not withhold any federal income tax from my distribution. (Must have U.S. Residence on file)

## 3. SIGNATURE

I certify that I am the proper party to authorize withholding elections on this account, and that all information provided is true and accurate. I have read the Withholding Disclosure above and have completed the [Notice of] Withholding Election above and have completed the Withholding Election.

Signature \_\_\_\_\_ Date \_\_\_\_\_