IRA DISTRIBUTION FORM INSTRUCTIONS

Morgan Keegan & Company, Inc
IRA Operations Department
50 North Front Street
Memphis, TN 38103

When requesting a distribution from an IRA, a Distribution Form must be completed and signed by the client.

Complete the form as follows:

Branch Check:	If a check is being requested, indicate whether or not it should be issued from the Morgan Keegan branch office. Note: If "no" is indicated, the check will be issued by Memphis cashiering.
Total Distribution:	Indicate whether or not all funds should be disbursed. Note: If "yes" is indicated, all securities and money market must be liquidated. Custodial and/or termination fees will be charged if due.
Branch Code:	Enter the two letter code indicating which Morgan Keegan branch is sending the distribution form (e.g. SR for Sarasota).
Account Name:	Enter the name on the account.
Branch Contact:	Enter the name of the person in the branch who may be contacted with any questions about the particular form.
P/D:	Leave blank. (This will be filled in by IRA Operations.)
Account Number:	Enter IRA account number (should match account name above).
IRS Code:	Leave blank. (This will be filled in by IRA Operations.)
Net Amount:	Enter the amount to be issued to the account holder or third-party.
Fed W/H:	Enter the amount to be sent to the government. Note: The net and the fed w/h amounts combined should equal the gross amount.
Description:	Enter a description to match the Distribution Type section below.
Special Payment Instructions:	Enter additional payment instructions, if any (e.g. check made payable to a third party). Note: Transfers to another firm must be processed through the ACATS Department.
Distribution Type for IRS Reporting:	Indicate the type of distribution being requested. Note: This election will determine what is reported to the IRS.
Distribution Method and Frequency:	-Indicate the method of distribution: Mark "Single Payment" for one time distributions; "Installment Payments" for automatic, recurring distributions; "Dividends and Interest Payments" for automatic income distributions; "RMD Auto-Calc Auto-Pay" for automatic calculation and disbursement of required minimum distributions; "In Kind" for disbursement of securities (enter security(s) and number of shares). -Indicate how to disburse the assets (i.e., ACH, check, journal, wire, register and ship). Note: Not all options are available for each method. -Indicate frequency (i.e., monthly, quarterly, semi-annually, or annually), if applicable. -Indicate payment beginning date, if applicable.
Withholding Election – Form W4P:	-Indicate whether or not Federal Income Tax should be withheld. Note: If electing to withhold, a withholding percentage must also be entered. -Indicate state withholding, if applicable, and withholding percentage.
Signature Section:	Sign and date the form. Note: If a Power of Attorney is signing, the POA and PAA forms must be on file.