



# financial life

A Fraternal Benefit Society

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## FEDERAL WITHHOLDING ELECTION NON-QUALIFIED PLANS

The distributions or withdrawals you receive from your Non-qualified Tax Deferred Annuity established at 1891 Financial Life may be subject to Federal Income Tax. Withholding will only apply to the portion of your distribution or withdrawal that is included in your income subject to Federal Income Tax.

If you do not sign and return the election by the date your distribution or withdrawal is scheduled to begin, Federal Income Tax **will not** be withheld.

If you elect not to have withholding apply to your distribution or withdrawal payments, or if you do not have enough Federal Income Tax withheld from your distribution or withdrawal, 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. Please consult your tax advisor for more information.

### Withholding Election

(Please select only one) – Consult your tax advisor for more information.

- I wish to have \_\_\_\_\_ % or \$ \_\_\_\_\_ Federal Income Tax withheld from the taxable portion of this payment.
- I do not wish to have federal income tax withheld from the taxable portion of this payment.

\_\_\_\_\_  
PRINT NAME OF PARTICIPANT / BENEFICIARY

\_\_\_\_\_  
SIGNATURE OF PARTICIPANT / BENEFICIARY

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY, STATE, ZIP

\_\_\_\_\_  
EMAIL

\_\_\_\_\_  
SSN / TIN

\_\_\_\_\_  
PRIMARY PHONE NO.

\_\_\_\_\_  
DATE

\_\_\_\_\_  
CERTIFICATE