Pension Fund of the Christian Church

SUBSTITUTE FORM W-4P FOR RECURRING DISTRIBUTIONS

☐ **Check here if this is an amended Form W-4P**

Complete this Substitute Form W-4P for Recurring Distributions to change the amount of federal income tax withheld from (i) your pension distributions from the Pension Plan of the Pension Fund of the Christian Church (Disciples of Christ) ("Pension Plan"), (ii) your annuity or installment distributions from your Traditional IRA under the Defined Contribution Retirement Accounts of the Pension Fund of the Christian Church (Disciples of Christ) ("DCRA"), (iii) your installment distributions from your Roth IRA under the DCRA, or (iv) your annuity or installment distributions from your 403(b) account under the Tax-Deferred Retirement Account of the Pension Fund of the Christian Church (Disciples of Christ) ("TDRA"). You may also use this Substitute Form W-4P to notify Pension Fund that you do not want any federal tax withheld from the distributions made to you (*except for distributions to United States citizens delivered outside the United States*).

Your previously filed Substitute Form W-4P will remain in effect if you do not file a Form W-4P for the current year.

- PLEASE TYPE OR PRINT CLEARLY -

I. MEMBER/IRA OWNER/BENEFICIARY INFORMATION

Name _____ SSN/ITIN __ __ __-__ __-__ __ __ __
(first) (middle) (last/family name) *Your SSN/ITIN is required for a valid election.*

Home Address _____

City _____ State _____ Country _____ Zip Code_____-_____

State of tax residence (*if different than above*) _____

II. FEDERAL INCOME TAX WITHHOLDING

This Substitute Form W-4P for Recurring Distributions applies to all recurring distributions that you receive from all your retirement plans with Pension Fund, including the Pension Plan, TDRA, Roth IRA, Traditional IRA, and/or annuities.

Pension Fund will withhold on distributions made to you as if you are married claiming three withholding allowances, unless you elect more withholding or no withholding from your distributions (*complete 1 or 2 only, not both*):

1. ☐ Do NOT withhold federal income tax from any distributions.
2. ☐ Withhold federal income tax from each distribution in accordance with the following:
   - Total number of allowances you are claiming for withholding from each recurring distribution: ☐☐
   - Marital status: ☐ Single ☐ Married ☐ Married, but withhold at higher single rate
   - Additional dollar amount, if any, you want withheld from each distribution: $☐☐☐☐.☐☐
     (You cannot enter an additional amount without entering the number of allowances above):

Withholding will apply only to the portion of your distribution that is included in your income.

Your election will remain in effect until you submit a new Substitute Form W-4P making a new election. You may submit a new Substitute Form W-4P at any time, and it will be effective the first day of the next month that falls at least 30 days after the completed Substitute Form W-4P is received by Pension Fund. If you elect not to have withholding apply to your distributions, or if you do not have enough federal income tax withheld from your distributions, you may be responsible for payment of estimated tax.

Pension Fund will not accept this Substitute Form W-4P unless you have both signed and dated it. If the social security number you provide on this Substitute Form W-4P is not correct or is omitted, Pension Fund is required to disregard your elections on this Form and to instead withhold on your pension, annuity, or installments distributions as if you are single claiming zero withholding allowances, even if you elected to have no withholding.

Signature _____ **Date** _____/_____/_____

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