

Qualified Charitable Distribution



4254 Saw Mill Run Blvd., Pittsburgh, PA 15227

Upon processing this Qualified Charitable Distribution (QCD) from GBU Life, I will receive a written acknowledgment stating the amount of my gift and that no goods or services were transferred to me by the organization in consideration for this gift. If the charity's address is not provided, then the check will be mailed to the member by default.

A completed Required Minimum Distribution (RMD) Service Request Form must accompany the QCD form.

If there are multiple payees, separate QCD forms are required for each.

Owner Name	Policy Number
Owner Signature	Date

Charity Name	Gift Amount		
Charity Street Address	City	State	ZIP

Top portion will be returned to the member.

Bottom portion will be included with the distribution check.

FOR HOME OFFICE USE ONLY.

Acknowledged and recorded on

by

TEAR HERE



CHARITABLE DISTRIBUTION

This gift was provided by: _____

If keeping this gift anonymous, leave the above line blank.

Phone: 412-884-5100 | 800-765-4428 | service@gbu.org | gbu.org

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Required Minimum Distribution Service Request Form

Policy Number	Contract Owner's Name

1 Required Minimum Distribution Options - Select only ONE option

Option 1 <input type="checkbox"/>	Automatic Required Minimum Distribution <input type="checkbox"/> *Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Annual <input type="checkbox"/> Annual Start Date _____ / _____ / _____ * If choosing Monthly, please complete the Direct Deposit / EFT information below
Option 2 <input type="checkbox"/>	One Time Full Required Minimum Distribution on the following date _____ / _____ / _____ * Use this option for this year only if you do not wish to set up an Automatic RMD payment
Option 3 <input type="checkbox"/>	DO NOT take any RMD as I will satisfy my GBU RMD with another institution

2 Federal Tax Withholding - GBU will withhold 20%, unless you elect otherwise below.

Option 1 <input type="checkbox"/>	DO NOT withhold federal income tax
Option 2 <input type="checkbox"/>	Withhold \$ _____ or _____ % for federal income tax

* GBU Does not withhold any state tax. Please consult your tax advisor with any questions on taxation.

3 Delivery Option

Option 1 <input type="checkbox"/>	Direct Deposit / EFT – the proceeds should arrive in your bank account within 3-5 business days: <input type="checkbox"/> Use current Direct Deposit Information provided to GBU <input type="checkbox"/> Use new/updated bank information (attach a voided check or provide bank information below) ABA Routing #: _____ Account # _____
Option 2 <input type="checkbox"/>	Check via regular mail
Option 3 <input type="checkbox"/>	Deposit funds to existing GBU Life or Non-Qualified Account # _____

Special Instructions:

4 Owner Information

Owner's Printed Name	Owner's Signature
Owner's Address	
Email	Date
Home Phone #	Cell Phone #