



IAP/IAA Service Center
 Attn: Customer Service
 P.O. Box 19009
 Greenville, SC 29602-9009
 Tel: (866)363-3290 Fax: (866)368-0095

**403(b) Distribution
 Request Form**

Check One:

Please print using dark ink

- IA American (IAA)
- Industrial Alliance Pacific Insurance and Financial Services Inc. (IAP)
 (DBA in CA as Industrial-Alliance *Pacific* Life Insurance Company, United States Branch)
 (DBA in OR as Industrial-Alliance *Pacific* Life insurance Company)

Policyowner Name: _____ Policy Number: _____

Street Address: _____

City: _____ State: _____ ZIP: _____

Daytime Phone Number: (____) _____

- I am requesting a full surrender.* (*This is the only option available to Life Insurance policies*)
- I am requesting the maximum withdrawal allowed to have my policy remain in-force.*
- I am requesting a withdrawal in the gross amount of \$_____*.
- I am requesting a penalty-free distribution.* A penalty-free distribution refers to a partial withdrawal that is allowed without having a surrender charge levied. This type of withdrawal may not be available. Please refer to your policy contract for more information.

*Federal and/or state taxes will be withheld and reported to the IRS. IAP or IAA will later provide you with a 1099R tax slip for the distribution. If you do not want taxes withheld, you must provide IAP or IAA with a completed W4P Form.

I acknowledge that if contributions are still being sent to IAP or IAA and applied to my policy, my request may be delayed for processing.

An employee of a non-profit organization is permitted under IRC Section 72(t) to request a distribution (either full or partial) from their own 403(b) policy. To determine eligibility, see the list of qualifying events below. **If you do not meet at least one of these events, your distribution will not be granted. IAP or IAA may approve, disapprove, or grant an amount less than the requested withdrawal.**

I would like to request a distribution for the following reason:

(Select one box below. Supporting documents are required for all qualifying events. For examples of supporting documentation, see Appendix on page 2).

- I am currently over the age of 59½**
- I am retired and I am age 55 or older**
- I have separated from service**
- I am disabled**
- I have entered into a Qualified Domestic Relations Order (QDRO)**
- I am in hardship as indicated below.** (select one):
Note: If my request is for a hardship distribution, it is my responsibility to provide IAP or IAA with a copy of my Salary Reduction Agreement confirming that my contributions will be stopped for at least 6 months.
 - I need to make this distribution due to medical expenses for myself, spouse, or dependants.
 - I need to make this distribution to purchase a principal residence for myself.
 - I need to make this distribution for payment of tuition and related educational fees for the next 12 months of post secondary education for myself, spouse, or dependants.
 - I need to make this distribution to prevent eviction from my residence, or to prevent foreclosure, excluding mortgage payments.

* Please refer to IRS Reg. 1.401(k)-1(d) (3)(iii) for further information regarding hardship distributions.

