DEFINITIONS AND USAGE OF FORMS

Retirement Account Forms

IRS Form W-4R
Use this form to determine the amount of federal income tax withheld from nonperiodic payments or eligible rollover distribution(s) for your IRA or Qualified Retirement Plan.

Distribution Request Form
Make distributions from your IRA account(s).

Inherited IRA Beneficiary Distribution Request Form
Complete this form if the Inherited IRA owner is deceased and the beneficiary is requesting a distribution. An IRA Application must also be completed to establish a new Inherited IRA.

IRA Automatic Withdrawal Form
Complete this form to set up recurring withdrawals from your Individual Retirement Account (IRA) or to arrange for us to determine and set up a required minimum distribution (RMD) plan for a Traditional IRA once you meet the IRS's RMD age requirements.

IRA Beneficiary Distribution Request Form
Complete this form if you are an IRA beneficiary to take a distribution or to establish an Inherited IRA. An IRA Application must also be completed to establish an Inherited IRA.

Inherited IRA Successor Beneficiary Distribution Request Form
Use this form if the initial beneficiary of an Inherited IRA passed away before the account's balance was exhausted, and the Successor Beneficiary is seeking a distribution from the Original Beneficiary's Inherited IRA assets.

Required Minimum Distribution Request Form
Request your required minimum distribution from your IRA account.

Required Minimum Distribution Worksheet
This worksheet will guide you through calculating your RMD for Traditional IRAs and Rollovers. Please note that this worksheet is for informational purposes only and should not be considered as tax or legal advice. Always consult a qualified tax or legal professional for advice specific to your situation.

Roth IRA Certification of Direct Rollover of Assets from a 529 Plan
This form is required to process a direct rollover from a 529 Plan account to a Bank of New York Mellon Custodial Roth IRA, managed by BNY Mellon Investment Adviser, Inc.

IRA Transfer Request Form
Transfer or directly roll over all or a portion of your current IRA, qualified plan or 403(b) Plan to an IRA.