

Contact Center: (800) 248-8447 | [www.ForgeTrust.com](http://www.ForgeTrust.com)

**Complete this form if you wish to take a withdrawal of your funds and/or assets from your Solo 401(k) retirement account. Please consult your tax advisor to determine tax consequences, if any, as a result of taking a withdrawal. Your Plan Administrator is responsible for all tax reporting as a result of this withdrawal.**

Check this box for PRIORITY PROCESSING (1-2 business days).  
Priority Processing fee of \$250 will apply if selected. Normal Processing will take 3-5 business days if in good order.

## 1. PERSONAL INFORMATION (\*required field)

Should we need to contact you regarding this request, your preferred method of contact is:

Email

Primary Phone

First Name*	Middle Name	Last Name*
Account Number*	Social Security Number* (last 4 digits)	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email* (Your personal email only)	
Citizenship*: US Citizen Resident Alien		

## 2. WITHDRAWAL INSTRUCTIONS

I authorize Forge Trust Co. to withdraw the funds from my solo 401(k) account and send me the net amount (less any fees) by the method selected:

Prior to releasing your funds we may contact you for verbal confirmation of these instructions.

### Full Withdrawal - Close My Account

All assets will be re-registered and/or assigned to you individually unless liquidation instructions are provided below or by attaching a Liquidation Request form. Liquidation, re-registration, and/or assignment fees may apply. An account termination fee will apply.

I elect to be invoiced for the account closure fees to allow me up to 5 days to pay by debit or with credit card online rather than use the available cash in my account. I understand I will receive an email to notify me once the fees have been assessed before I can pay online. If I do not pay within 5 days, and I have available cash, the fees will sweep from cash to proceed with my request.

### Partial Withdrawal

\$ \_\_\_\_\_ gross of current available cash (Put "All" to indicate all available cash less fees and minimum cash balance)

Liquidate/Sell - After receipt, send available monies ((Select only if you have NOT personally initiated the liquidation. Only available for publicly traded positions.))

Investment Name	Ticker/Cusip	No. of Shares or Dollar Amount

### In-Kind (as directed below)

Investment Name	No. of Shares or Dollar Amount

Note: If you would like to request more than 3 investments, please list all investments on a separate attachment.

### 3. DELIVERY INSTRUCTIONS (default is by check if no option is selected below)

I authorize Forge Trust Co. to withdraw the funds from my solo 401(k) account and send me the net amount by the method selected.

<b>Check to my current address of record</b> (disbursement fee applies)	Send via (select one): Regular mail Overnight mail (overnight delivery fee + shipping cost* apply) *Charge cost to FedEx/UPS account: _____ If no account # is provided, it will be billed to your IRA account at cost and sent via FedEx.		
<b>Wire</b> (disbursement fee + outgoing wire fee apply)	<b>Bank Name*:</b>		
	<b>Bank Address*:</b>		
	<b>Bank Phone Number*:</b>		<b>Attention:</b>
	<b>ABA (wire routing number)*:</b>		
	<b>Account Name*:</b>		
	<b>Account Number*:</b>		
	<b>Credit - Name on Account:</b>		
	<b>Credit - Account Number:</b>		
* Must match the client account name on record.			

### 4. ACKNOWLEDGMENT & PARTICIPANT SIGNATURE

As set forth in my Forge Trust Co. Agreement, I hereby elect and acknowledge the foregoing withdrawal. I acknowledge that Forge Trust Co. and its representatives do not provide tax, legal or investment advice and I assume full responsibility of this withdrawal. I acknowledge that Forge Trust Co. may contact me for verbal confirmation of my instructions, which may cause delays if I cannot be reached at the phone number on record.

Participant's Signature 	Date (MM/DD/YYYY)
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Please sign and submit additional documents as required.

## DELIVERY INSTRUCTIONS

Please submit your request by one of the methods provided.

**Email**  
distributions@ForgeTrust.com

**Fax**  
(650) 745-1403

**Regular mail**  
Forge Trust Co.  
PO Box 2048  
San Francisco, CA 94126

**Overnight mail**  
Forge Trust Co.  
4 Embarcadero Ctr, Floor 15  
San Francisco, CA 94111