

Contact Center: (800) 248-8447 | 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.

Check to my current address of record (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 number is provided, the cost of shipping will be charged to your account and sent via FedEx		
Wire (disbursement fee + outgoing wire fee apply)	Bank Name*:		
	Bank Address*:		
	Bank Phone Number*:	Attention:	
	ABA (wire routing number)*:		
	Account Name*:		
	Account Number*:		
	Credit - Name on Account:		
	Credit - Account Number:		
* 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