



4 Payment Information

4.a. Distribution via Check

Instruction 1: [ ] Add [ ] Change [ ] Remove

Instruction 2: [ ] Add [ ] Change [ ] Remove

Payee

Payee

Address Line 1

Address Line 1

Address Line 2

Address Line 2

City State Zip Code

City State Zip Code

4.b. Distribution via Wire or ACH

Wire or ACH cannot be completed unless all information is provided.

Wire Fee: A \$20 fee will be deducted in addition to amount of distribution.

ACH Note: Please attach an unsigned voided check for ACH distributions to checking accounts, or bank provided routing instructions for ACH distributions to savings accounts; failure to provide this documentation may result in processing delays. For Further Credit destinations are not accepted on ACH transfers. ACH can only be sent to the registered account owner's bank account; checking or savings.

IRA Note: Distributions involving State Withholding cannot be sent via wire. If a wire is requested for an account withholding state taxes, an ACH will be sent.

Investor Account 1: [ ] Add [ ] Change [ ] Remove

Investor Account 2: [ ] Add [ ] Change [ ] Remove

Type of Distribution: (Select one)

Type of Distribution: (Select one)

[ ] Wire OR [ ] ACH

[ ] Wire OR [ ] ACH

Type of Account: (Select one)

Type of Account: (Select one)

[ ] Checking OR [ ] Savings

[ ] Checking OR [ ] Savings

Bank Name

Bank Name

Bank City State Zip Code

Bank City State Zip Code

ABA Routing Number

ABA Routing Number

Account Name

Account Name

Account Number

Account Number

For Further Credit Account Name (Wire only, not available for ACH)

For Further Credit Account Name (Wire only, not available for ACH)

For Further Credit Account Number (Wire only, not available for ACH)

For Further Credit Account Number (Wire only, not available for ACH)

**5 Signatures**

I/We certify that the information I/we have provided is true and correct. I/We further agree that SPTC, its parent and affiliates, **will not** be liable for any loss, liability, cost, or expense for acting as directed in this request.

**Note: All signatures are required below.** In the case of an entity, e.g., trust or corporation, the investor signature should be that of an authorized person.

\_\_\_\_\_  
Investor's Signature Date

\_\_\_\_\_  
Joint Owner's Signature (if applicable) Date

**Acknowledged By:**

\_\_\_\_\_  
Financial Professional's Signature Date

\_\_\_\_\_  
Broker-dealer Signature (if required by the Broker-dealer) Date