

# Individual Retirement Account Withdrawal Authorization and Instructions for Distribution

DO NOT USE THIS FOR 70½ REQUIRED DISTRIBUTIONS, ROTH OR SIMPLE IRA DISTRIBUTIONS

For assistance in completing this form please call 1-800-462-2392

**Burnham Investors Trust**  
c/o PFPC Inc. PO Box 9781  
Providence, RI 02940-9781

## 1 PERSONAL INFORMATION:

**TYPE OF ACCOUNT:**  IRA  Rollover IRA  SEP-IRA

\*NAME \_\_\_\_\_ \*SOCIAL SECURITY NUMBER \_\_\_\_\_

\*STREET \_\_\_\_\_ \*DATE OF BIRTH \_\_\_\_\_

\*CITY \_\_\_\_\_ \*STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_ DAYTIME TELEPHONE \_\_\_\_\_

\*Required information.

## 2 REASON FOR DISTRIBUTION

Check the box that applies.

- Under age 59 ½ (Premature)
- Age 59 ½ or older (Normal)
- Disability
- 1st Time Home Purchase
- Under age 59 ½ (Premature Exception\*)
- Divorce or Legal Separation
- Death (*Death Certificate and Letter of Instructions required*)

The proper documentation must be received or attached for each distribution type before the request will be processed. All legal documents must be certified and a Medallion Signature Guarantee is required for the IRA owner/beneficiary or spouse.

*\*Premature exception requires you to take a specific amount each year based upon a life expectancy. This amount must be specified by you each year and will not be calculated for you.*

## 3 PAYOUT METHOD

Partial Withdrawal/Amount: \_\_\_\_\_  
dollars/shares (circle one)

Fixed Amount: \_\_\_\_\_  
dollars/shares (circle one)

Frequency: MONTHLY QUARTERLY ANNUALLY (Circle one)

- Total Distribution of Account
- Mail to my address currently on file.
- Mail to the following address (*A Medallion Signature Guarantee is required*):  
\_\_\_\_\_  
\_\_\_\_\_

FINANCIAL INSTITUTION'S NAME \_\_\_\_\_

ACCOUNT NUMBER (to be used if check is going to another Financial Institution) \_\_\_\_\_

- Purchase funds into my existing Burnham Investors Trust non-retirement mutual fund account:

FUND \_\_\_\_\_ ACCOUNT NUMBER \_\_\_\_\_

- New Account: Check here and attach a completed new account application to purchase a new Burnham Investors Trust mutual fund account.

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## 4 WITHHOLDING ELECTION

Generally, Roth IRA distributions are subject to 10% withholding unless you elect to have an additional amount withheld or elect to have no withholding. You may make a withholding election by selecting one of the options below. Your election will remain in effect for any subsequent distributions unless you change or revoke it by providing us with a new election.

**Please select one of the following:**

(If no election is made, 10% will be withheld)

- Do not withhold Federal Income Tax
- Withhold 10% Federal Income Tax
- Withhold \_\_\_\_\_% Federal Income Tax  
(tax must be greater than 10%)

**CAUTION:** Even if you elect not to have Federal Income Tax Withheld, you are liable for payment of Federal Income Tax on the taxable portion of your distribution. You also may be subject to tax penalties under the estimated tax payment ruled if your payments of estimated tax and withholding, if any, are not adequate.

When completed, please return the signed form to:

**First Class Mail**  
Burnham Investors Trust  
C/O PFPC Inc.  
PO Box 9781  
Providence, RI 02940-9781  
1-800-462-2392

**Overnight Express**  
Burnham Investors Trust  
C/O PFPC Inc.  
760 Moore Road  
King of Prussia, PA 19406-1212  
1-800-462-2392

## 5 SIGNATURE

I certify that I am the Participant authorized to make these elections and that all information is true and accurate. I further certify that no tax or legal advice has been given to me by the Custodian, PFPC Trust Company, or any agent of either of them, and that all decisions regarding the elections made on this form are my own. The custodian is hereby authorized and directed to distribute funds from my account in the manner requested. The custodian may conclusively rely on this certification and authorization without further investigation or inquiry. I expressly assume responsibility for any adverse consequences which may arise from the election(s) and agree that the custodian, Burnham Investors Trust, and their agents shall in no way be responsible, and shall be indemnified and held harmless, for any tax, legal or other consequences of the election(s) made on this form. This form may only be used for one account. If you have another account from which you wish to take distributions, please fill out a separate form.

PARTICIPANT'S SIGNATURE (or beneficiary's signature if Participant is deceased.) \_\_\_\_\_

DATE \_\_\_\_\_

MEDALLION SIGNATURE GUARANTEE — Medallion Stamp\*

\* (The Medallion Signature Guarantee may be executed by banks, broker dealers, credit unions, national securities exchanges and savings associations which participate in STAMP, SEMP or NYSE-MSP. A notary public is NOT a substitute for a Signature Guarantee. The Medallion Signature Guarantee stamp must include the words "SIGNATURE GUARANTEED, MEDALLION GUARANTEED" and otherwise comply with the medallion program requirements. Please check your fund prospectus or with your fund as to whether a Medallion Signature Guarantee is required.)