

J.P. Morgan Securities LLC
Member FINRA and SIPC

You can submit this form and any attachments by

Secure Message
Visit www.chase.com/brokerageforms for instructions on how to submit this request online by Secure Message.

Fax
(866) 786-4788

Mail
J.P. Morgan Securities LLC
Attn: Transfer – WM
10 South Dearborn St.
Chicago, IL 60603

If you need help, contact our Client Service Center at (800) 392-5749 or submit a Secure Message through chase.com.

Use this form to

- Authorize a one-time "qualified charitable distribution" (as defined by the Internal Revenue Code) from your J.P. Morgan Securities, LLC ("JPMS") Traditional or Roth IRA in the form of a check, made payable to a charity.

What you need to know

- "Qualified charitable distributions" under the Internal Revenue Code must be made on or after the date on which you attain age 70½ and are subject to an individual annual maximum distribution amount of \$100,000. Your qualified charitable distribution may be counted toward your required minimum distributions for the year. For additional information, see IRS Publication 590-B.
- Check with your tax advisor regarding the requirements of a qualified charitable distribution and the tax consequences of your distribution. JPMS is not responsible for whether the distribution is a qualified charitable distribution.
- For best results, complete this form using Adobe Acrobat Reader. You will need to print a paper copy for your signature. If you are completing this form by hand, a space will be provided for you to write your name and account number on each page when you print the form.
- If you are submitting this form by Secure Message, notarization is not required. This form must be notarized only if you are submitting this form by fax or mail.
- For your protection, we may call you at the number on file for your account to confirm this transaction before it is processed.

1. Tell Us About Your Account

Your Name

Your Account Number

2. Tell Us About Your Distribution

Name of the Charity

Tax ID of the Charity

Dollar Amount You'd Like to Distribute

3. How Would You Like Your Distribution Delivered?

Optional overnight delivery: Please send this check overnight. Overnight delivery requests will expedite a check's receipt but only after the transaction itself is processed. Fees can be found at www.chase.com/online-investing-fees.

Send a check, made payable to the charity, to my address of record.

Send a check, made payable to the charity, directly to the charity's address below.

Charity Mailing Address

City

State

ZIP Code

If the check is mailed directly to the charity, you may not receive a receipt from the charity for your records.

**INVESTMENT AND INSURANCE PRODUCTS ARE:
• NOT A DEPOSIT • NOT FDIC INSURED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY
• NO BANK GUARANTEE • MAY LOSE VALUE**

J.P. Morgan Securities LLC
Member FINRA and SIPC

4. Federal and State Withholding Elections

You must make an election for both federal and state tax withholding.

- **U.S. Person (U.S. Citizen or Resident Alien) or Beneficiary that is a U.S. Estate, Trust or Charity**
 - Distributions from an IRA are subject to federal and, in some cases, state income tax withholding.
 - Unless you elect otherwise, 10% of your distribution amount must be withheld in prepayment of federal income taxes.
 - Your elections will remain in effect until revoked by you in writing.
 - If applicable, state income tax must be withheld according to the requirements for your state of residence.
 - Several states require withholding from your distribution if you are subject to federal income tax withholding and may require that a separate election form be completed.
 - Consult your tax advisor for additional information regarding state income tax withholding.
- **U.S. Person residing abroad**
 - If you are a U.S. person residing abroad, you are not permitted to opt out of federal income tax withholding. We will withhold 10% unless a greater amount is elected.
- **Withholding for Nonresident Aliens or a Beneficiary that is a Foreign Estate, Trust or Charity**
 - If you are a nonresident alien, this form must be accompanied by a properly completed IRS Form W-8BEN.
 - We will generally withhold tax at a rate of 30%.
 - If you are a foreign simple or grantor trust, you must provide Form W-8IMY along with any necessary supporting documentation required by the Form W-8IMY instructions.

See IRS Publication 505 at www.irs.gov or speak to your tax advisor for more information on federal income tax withholding, and estimated tax requirements and penalties.

FEDERAL WITHHOLDING

You may elect not to have federal income tax withholding apply to your distribution by selecting the first option below. Your election will remain in effect until you revoke it in writing, which can be done at any time. There are penalties for not paying enough federal income taxes during the year, either through withholding on distributions or by making estimated tax payments.

- I elect to have no federal income tax withheld from my distribution.
- I elect to have the following percentage withheld from my distribution.
(must be 10% or greater) (percentage)

STATE WITHHOLDING

Certain states require withholding of a specific minimum percentage of your distribution or federal tax-withholding amount, or an amount in whole dollars. By signing this form, you authorize JPMS to adjust the withholding amount or percent requested to meet those requirements.

- I elect to have no state income tax withheld from my distribution, or I certify that I am not subject to state tax withholding.
- I elect to have the following percentage withheld from my distribution.
(percentage)
- I elect to have the following dollar amount withheld from my distribution.
(in whole dollars)

J.P. Morgan Securities LLC
Member FINRA and SIPC

5. Authorization

By signing below, I authorize J.P. Morgan Securities LLC (“JPMS”) to make this one-time qualified charitable distribution from my JPMS Traditional or Roth IRA as indicated on this form.

I acknowledge and understand:

- There may be fees associated with the liquidation of certain investments and/or the distribution.
- I am responsible for ensuring that there are sufficient funds available in my JPMS IRA for this distribution.
- This distribution can have important tax consequences and that this distribution and any tax withholding, if applicable, will be reported to the IRS on Form 1099-R or Form 1042-S.
- I should consult a legal, accounting or tax advisor with any questions.
- I assume full responsibility for the tax consequences of this election and the resulting distribution.
- This authorization is to remain in full force and effect until JPMS has received written notification (provided to JPMS at J.P. Morgan Securities LLC, IL1-0291 4th Floor, 131 South Dearborn Street, Chicago, IL 60603-5506) from me of its termination in such time and in such manner as to afford JPMS and the bank/financial institution a reasonable opportunity on which to act.
- I hereby agree to indemnify and hold JPMS, its successors, affiliates, assigns, officers, directors, agents and employees (the “Indemnified Parties”) harmless from, and to pay the Indemnified Parties promptly on demand, any and all losses, liabilities, damages, claims, costs or expenses (including attorneys’ fees and expenses) incurred by the Indemnified Parties in connection with their reliance on this distribution request and authorization(s), including in the event that I fail to meet any applicable requirements regarding the requested distribution from my IRA. These indemnification provisions are in addition to (and in no way limit or restrict) any rights which any of the Indemnified Parties may have under any other agreement(s) between myself and any of the Indemnified Parties or under any federal or state statutes, laws, rules or regulations. This indemnity shall survive termination of any authorization with respect to transactions entered into during the term of the authorization.

I certify that:

- No tax or legal advice has been given to me by JPMS and all decisions regarding this election are my own.
- Under penalties of perjury, I am a U.S. person (including a U.S. resident alien).

Your Signature

Date (month/day/year)

6. Notarization

If you are submitting this form by Secure Message, notarization is not required.

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

STATE OF _____) COUNTY OF _____) Subscribed, sworn to and acknowledged before me by _____ Name of Document Signer (above) this _____ day of _____ , _____ . Day Month Year _____ Signature of Notary Public) SS: <div style="border: 1px solid black; width: 150px; height: 100px; margin: 10px auto; text-align: center;">Place Stamp Here</div>
	My commission expires _____