

72t Removal Request Form

INSTRUCTIONS:

1. Read the attached statements.
2. Consult with your tax advisor regarding any change(s) as this may cause possible tax penalties.
3. Complete the Systematic Withdrawal Plan Acknowledgment Section.
4. Sign the form.
5. Mail or fax the completed, signed form to:

Please send to:	Regular Mail	Overnight Mail
	Primerica Shareholder Services P.O. Box 534485 Pittsburgh, PA 15253 – 4485	Primerica Shareholder Services Attention: 534485 500 Ross Street, 154-0520 Pittsburgh, PA 15262
Client Services:	(800) 544-5445	
Fax Services:	(833) 748-3938	

You may use this form to request that your 72t agreement be removed from your account

SECTION 1 – 72t REMOVAL REQUEST STATEMENT

Read the 72t Removal Request thoroughly. This section explains what happens when you remove your 72t agreement from your account. Please consult with your tax advisor prior to disrupting this or any 72t Agreement.

SECTION 2 – SYSTEMATIC WITHDRAWAL PLAN ACKNOWLEDGMENT

If you currently have a Systematic Withdrawal Plan on the account, it will continue for the same dollar amount and frequency but will not be coded a 72t distribution. If you wish to stop the Systematic Withdrawal Plan option, please send in a separate request OR make a selection on page 2.

SECTION 3 – SIGNATURES AND ACKNOWLEDGMENT

Please read the Client Acknowledgment and sign and date the form. Mail completed form to the address provided at the top of this instruction page.

(This page retained by the Client)

72t Removal Request Form

1 | 72t REMOVAL REQUEST STATEMENT

I, _____ (Shareholder), acknowledge and understand that if I elect to have the 72t removed from my account prior to the expiration of the 72t agreement (the later of age 59 ½ or 5 years since date of 72t agreement), I am subject to applicable taxes and/or penalties according to the IRS guidelines. Taxes and penalties may not only apply to this withdrawal but on past withdrawal(s) as well.

In addition, any deposit(s) of additional funds while the 72t is on my account OR any removal of funds in excess above and beyond the 72t original amount that was set in my 72t agreement is considered a violation, and the 72t agreement will be removed from my account if the 72t agreement had not yet expired by the following parameters: the later of age 59 ½ or 5 years since date of 72t agreement.

If any of the preceding rules are violated, I, the shareholder, will be busting my 72t agreement and taxes will be owed on all amounts that were removed from my account from day one of the 72t agreement. In essence, it would be as if the 72t was not placed on this account initially. In addition, Primerica Shareholder Services will remove the 72t from my account if any of the above rules have been broken and subsequent withdrawals will not have the 72t provisions on your account.

2 | SYSTEMATIC WITHDRAWAL PLAN ACKNOWLEDGMENT

Please review and select the appropriate option below regarding your Systematic Withdrawal Plan (SWP) option.

I currently have a SWP on this account, and I would like for this to remain understanding it will not be coded as a 72t distribution going forward. In addition, the SWP amount and frequency will remain the same.

OR

I currently have a SWP on this account and I would like to discontinue all future SWP on this account.

3 | SIGNATURES AND ACKNOWLEDGMENT

Please consult with your tax advisor prior to disrupting this or any 72t agreement as applicable taxes and penalties may apply.

If you understand the above statement and still wish to end your 72t agreement, please print and sign your name below showing acknowledgment of all the rules and regulations of this agreement.

Print Name

Account Number

Signature

Date

<p>Once completed, mail the form to the address listed or fax this request to the appropriate service number for processing.</p>	<p>Please send to:</p>	<p>Regular Mail</p>	<p>Overnight Mail</p>
		<p>Primerica Shareholder Services P.O. Box 534485 Pittsburgh, PA 15253 – 4485</p>	<p>Primerica Shareholder Services Attention: 534485 500 Ross Street, 154-0520 Pittsburgh, PA 15262</p>
	<p>Client Services:</p> <p>Fax Services:</p>	<p>(800) 544-5445</p> <p>(833) 748-3938</p>	