



IRA WITHHOLDING ELECTION CHANGE FORM

Overnight Delivery:
Metzler/Payden Funds
803 W. Michigan St., Suite A
Milwaukee, WI 53233-2301

Regular Mail:
Metzler/Payden Funds
P.O. Box 1611
Milwaukee, WI 53201-1611

Please make checks payable to Metzler/Payden Funds

Please complete the following form if you wish to change your tax withholding elections on your IRA, SEP-IRA or SIMPLE IRA account. Complete a separate form for each Metzler/Payden Funds IRA account type (e.g., IRA, SEP-IRA).

1. ACCOUNT INFORMATION

Fund _____ Account Number _____

Fund (Optional) _____ Account Number _____

Fund (Optional) _____ Account Number _____

Daytime Phone Number _____ Evening Phone Number _____

Type of account (select only **one**): IRA SEP-IRA Simple

2. WITHHOLDING ELECTION (Substitute W-4P OMB)

You must select one of the options below. Withholding election is not necessary for Roth IRA accounts.

The distribution(s) you receive from your Metzler/Payden Funds retirement account are subject to federal income tax withholding at a rate of 10% unless you elect not to have withholding apply. Withholding will only apply to the total amount of the distribution, whether taxable or not. You may elect not to have withholding apply to you. If you elect not to have withholding apply to your distribution payments, or if you do not have enough federal income tax withheld from your distribution, you may be responsible for payment of estimated tax. You may incur penalties under the estimated tax rules if your withholding and estimated tax payments are not sufficient. The withholding election below will be applied to all distributions from this account from this date forward unless the election is changed. You may change your withholding election for future distributions by completing a new IRA Withholding Election Change Form. If no selection is made, 10% will automatically be withheld from all distributions from your Metzler/Payden Funds Retirement Account.

- I do not want federal income tax withheld from distributions from this account.
- I want federal income tax of 10% withheld from distributions from this account.
- I want federal income tax of _____% (greater than 10%) withheld from distributions from this account.

3. SIGNATURES

I certify that I am the proper party to authorize withholding elections on this account, and that all information provided is true and accurate. I have read the Withholding Disclosure above and have completed the Withholding Election in Section 2.

Signature _____ Date _____