



- Use this form to request a qualified charitable distribution (QCD) from a traditional, Roth, SIMPLE¹ (including SIMPLE Plus and Roth SIMPLE), SEP/SARSEP¹ or inherited IRA.
- You must be at least 70½ or older on the date of distribution. If you are RMD age and the account is subject to a required minimum distribution (RMD), the distribution counts toward your RMD for the current year.
- **The QCD will be tax reported on Form 1099-R as a qualified charitable distribution.** The distribution will be tax reported on Form 1099-R. It will be tax reported as a qualified charitable distribution, with the exception of Roth IRAs. For more information, refer to www.irs.gov or consult your tax advisor.
- As a QCD is not subject to tax withholding, it will not be applied to this request.

1 Account owner information

First name _____ MI _____ Last _____ Account number² or plan ID _____

Address _____ City _____ State _____ ZIP _____

Email address³ _____ () _____
Daytime phone

Citizenship: U.S. citizen U.S. resident alien Nonresident alien (Submit an IRS Form W-8BEN.)

Note: If you are a nonresident alien, you may only request a one-time distribution. Automatic distributions are not available. Call us for additional information.

Footnotes:

¹ A QCD cannot be made from an ongoing SIMPLE, SEP or SARSEP IRA. The account is generally considered to be ongoing if you make salary deferrals or receive employer contributions for the current tax year.

² SIMPLE IRA participants with pre-tax and Roth assets: Review your account statement. If separate account numbers are assigned for pre-tax and Roth assets, ensure the correct account is listed. If applicable, a separate request must be submitted for each account.

³ Your privacy is important to us. For information on our privacy policies, visit www.capitalgroup.com.

2 Instructions
Complete A or B.

Note: For 2026, the maximum aggregate amount excludable from gross income as a QCD is \$111,000 per individual per tax year. Within that limit, an individual may make a one-time QCD of up to \$55,000 to a split-interest entity (i.e., a charitable remainder annuity trust, charitable remainder unitrust, or charitable gift annuity) and may also make QCDs of the remaining amount directly to one or more qualified charities in the same tax year. If you made deductible IRA contributions after age 70½, the amount of a QCD that you can exclude from income may be reduced. You should consult with your tax advisor regarding applicable IRS rules based on your circumstances to ensure the distribution satisfies the QCD requirements.

A. One-time distribution — Complete 1 or 2.

1. If your account statement includes an account number, specify the funds and amount(s) below. If your statement includes a plan ID, proceed to 2. For fund names and numbers, review your statement or access your account at www.capitalgroup.com.

Fund name or number	Amount
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

To avoid delays in processing your request, be sure that the distribution will not reduce any fund balance below the established fund minimums that must be met and maintained. **The fund minimums are \$1,000 for the money market, interval and state-specific tax-exempt bond funds or \$250 each for all other funds.** For fund names and numbers, review your statement or access your account at www.capitalgroup.com.

OR

2. If your account statement includes a plan ID that begins with 754 (SIMPLE IRA Plus) or 2, complete the following to designate the source of assets for the distribution.

Pre-tax assets:	Roth assets:
\$ _____	\$ _____
Amount	Amount

Note: The distribution will be taken proportionally from all funds in the contribution type(s).



2 Instructions (continued)

B. Automatic payments

Specify the distribution amount(s). Specify the funds and amounts below. For fund names and numbers, review your statement or access your account at www.capitalgroup.com.

Fund name or number	Amount (\$50 min. per fund)
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total	\$ _____

Frequency: Select payment frequency

- Monthly
 Quarterly
 Semiannually
 Annually

Note: If no selection is made, the default will be "Annually."

Start date: Make the first distribution on _____
(mm/dd/yyyy)

Stop date (optional): Make the last distribution on _____
(mm/dd/yyyy)

3 Charitable organization information

- Notes:**
- The charity must be an organization that is eligible to receive tax-deductible contributions. Consult your financial professional or tax advisor to ensure the organization is eligible.
 - The check will be made payable to the charitable organization.
 - Follow up with the charity for a receipt of your donation.
 - **If the distribution amount is more than \$25,000, a signature guarantee is required in Section 4.**

Name of charitable organization

Delivery instructions (select one):

Mail the check to the address listed in Section 1.

OR

Mail the check directly to the charitable organization.

Attention

Address

City

State

ZIP

Note: If no selection is made, the check will be mailed directly to the charitable organization if an address is provided above.

