

Qualified Charitable Distribution Form

PO Box 219109 • Kansas City, MO 64121-9109 • (877) 445-2687

Use this form to have Janus Henderson distribute your Janus Henderson IRA for a Qualified Charitable Distribution (QCD). Complete a separate form for each charity.

Note: Please do not use this form for a 403(b)(7) or Qualified Retirement Plan account.

Questions?

Call us at (877) 445-2687

Step 1 – Account Information

First Name

Middle Initial

Last Name

Account Number

Date of Birth (Must be at least 70½)

Phone Number

Address

City

State

ZIP Code

Step 2 – Distribution Amount

Select one of the following options:

☐ Specific Amount \$ _____ Fund Name or Number: _____

- OR -

☐ Required Minimum Distribution (RMD) (*Select one*)

☐ Distribute proportionally from each fund

☐ Distribute from a specific Fund Name or Number: _____

Note: If you have different distribution instructions, please submit a detailed Letter of Instruction with this form.

Step 3 – Required Minimum Distribution (RMD) Calculation

Only complete this step if you selected “RMD” in Step 2.

☐ **Beneficiary is your spouse.**

(This includes if your beneficiary is a trust and your spouse is the sole beneficiary of the trust.)

Spouse's Name

Date of Birth

☐ **Beneficiary is not your spouse.**

REQUIRED INFORMATION: Provide the value of any retirement accounts you transferred to Janus Henderson this year, as of December 31 of last year.

\$ _____

Step 4 – Payee Name as It Should Appear on the Check

Name of charitable organization as defined under IRC Sec. 170(b)(1)(A)

☐ Mail the check directly to the above-named charitable organization at the following address.

Mailing Address

City

State

ZIP Code

☐ Send the assets to the charitable organization's brokerage account.

Name of Financial Institution: _____

Charitable Organization's Account Number: _____

☐ Mail the check to my address of record for me to forward. Check will be payable to the charitable organization.

Step 5 – Adjust Your Scheduled Distribution

☐ I have a scheduled distribution for the amount of my RMD. Please decrease this year's scheduled distribution by the amount of my QCD.

Important Note: If this box is not checked, your regular distribution will still occur in addition to this request. This could result in unwanted additional distributions.

Step 6 – Read, Sign, and Obtain a Signature Guarantee (Required)

Due to the important tax consequences associated with individual retirement distributions, I have been advised to consult with a tax professional. I agree that the informational provided is accurate and adheres to the following Qualified Charitable Distribution (QCD) rules under Internal Revenue Code Sec. 170.

1. You must be 70½ or older.
2. The distribution meets the deductibility requirements.
3. The distribution is from pretax assets (or taxable earnings, if from a Roth IRA).
4. If the distribution is from a SEP IRA or SARSEP IRA, the account is inactive.
5. The combined distribution amount is \$111,000 or less for the year.
6. You will not receive any additional benefit from the receiving organization in return for this charitable donation.



Signature of Account Owner

Date

A signature guarantee is required because the assets are being paid to a party other than the owner of the account. Please contact a Janus Henderson Retirement Representative at (877) 445-2687 if you have any questions.

SIGNATURE GUARANTEE STAMP
(Including Medallion Guarantees)

PLACE GUARANTEE STAMP AND AUTHORIZED SIGNATURE INSIDE OF THE SPACE PROVIDED ABOVE. DO NOT OVERLAP ANY PART OF THE STAMP AND/OR SIGNATURE WITH OTHER TEXT IN THE APPLICATION.

A signature guarantee assures a signature is genuine and protects you from unauthorized requests on your account. Financial institutions that may guarantee signatures include banks, savings and loans, trust companies, credit unions, broker/dealers and member firms of a national securities exchange. Contact the financial institution you intend to obtain a signature guarantee from for further information.

A notary public cannot provide a signature guarantee.