



## 4 How do you want the excess contribution being removed to be distributed?

*Before making your selection and providing instructions below, be sure to consult a tax advisor about the implications of your choice.*

**IMPORTANT INFORMATION:**

- **Movement of assets from a Traditional IRA to a Roth IRA or from a Roth IRA to a Traditional IRA for the same tax year is a recharacterization, not an excess. If your request is for a recharacterization, obtain a recharacterization form.**
- **If instructions are not provided below, we will issue a check. If you select a reinvest option and do not provide allocation instructions, the amount removed will be reinvested in the same fund(s), percentage(s) and share class.**

Select one option below.

- A.  Reinvest as a current-year contribution \$ \_\_\_\_\_ at net asset value, if applicable, in my new or existing Traditional or Roth IRA. The contribution must not exceed the current-year contribution limit. Any amounts in excess of the current-year contribution limit will be returned to you by check unless you specify a different distribution method.

**Example:** If your excess contribution is \$500 and your current-year contribution will only allow for an additional \$400, the remaining \$100 will be returned to you unless you specify a different distribution method for the remaining \$100. If opening a new account, attach the appropriate application.

	Fund name or number	Percentage
_____ Existing Traditional or Roth IRA account number	_____	_____ %
	_____	_____ %
	_____	_____ %
	_____	_____ %
	_____	_____ %

**Note:** Any earnings removed will be reinvested as indicated above, not to exceed the current-year contribution limit.

- B.  Reinvest at net asset value, if applicable, the excess amount, plus any earnings, in my new or existing non-retirement account. If opening a new account, attach the appropriate application.

	Fund name or number	Percentage
_____ Existing non-retirement account number	_____	_____ %
	_____	_____ %
	_____	_____ %
	_____	_____ %
	_____	_____ %

- C.  Issue a check. (Electronic deposit to bank accounts via Automated Clearing House (ACH) is not available.)

## 5 Authorization and signature guarantee

I direct CB&T to distribute the excess contributions from my account in the manner I have indicated in Section 4. I certify that the above information and attached documentation (if applicable) are accurate and that I am entitled to receive the payments for which I have applied.

In consideration of CB&T acting on such instructions and processing such transactions, or should I not be entitled to all or any part of the payments for which I have applied, I agree to hold harmless and indemnify CB&T; any of its affiliates or mutual funds managed by such affiliates; and each of their respective directors; trustees; officers; employees; and agents from any losses, expenses, costs or liability (including attorney fees) that may be incurred as a result of CB&T acting on such instructions.

\_\_\_\_\_  
Name of IRA owner (print)

**X**  
\_\_\_\_\_  
Signature of IRA owner

\_\_\_\_\_  
Date (mm/dd/yyyy)

**This document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.**

**A signature guarantee is required if the distribution request is:**

- greater than \$125,000

**OR**

- being mailed to the address of record and the address has changed in the last 10 calendar days.

**If required**, signatures must be guaranteed by a bank, savings association, credit union, member firm of a domestic stock exchange or the Financial Industry Regulatory Authority that is an eligible guarantor institution. **A notary public is NOT an acceptable guarantor.** The guarantee must be in the form of a stamp or a typewritten or handwritten guarantee that is accompanied by a raised corporate seal.

▼ Stamp signature or medallion guarantee here. ▼

**If a signature guarantee is required, this form must be mailed.**

If mailing, choose the service center for your state. Mail the form to the Indiana Service Center if you live outside the U.S.



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Indianapolis, IN 46206-6164

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12711 N. Meridian St.  
Carmel, IN 46032-9181



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