



NON-SPOUSE, TRUST, ESTATE OR ENTITY BENEFICIARY IRA INHERITANCE REQUEST FORM

AMG Funds
P.O. Box 9769
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800.548.4539

ORIGINAL IRA OWNER'S INFORMATION

The following IRA owner has passed and I am requesting that you transfer ownership of the inherited proceeds.

Roth IRA *Traditional / SEP / SIMPLE

▲ Original IRA Owner's Account Number

▲ Original IRA Owner's Full Name

▲ Birth Date

▲ Death Date

Check all that apply:

- Death Certificate is attached
- Death Certificate was provided under separate cover
- Notarized Affidavit of Domicile ("AOD") is attached
- Notarized AOD was provided under separate cover
- If applicable, an Inheritance Tax Waiver is attached

▲ Surviving Spouse, if identified on the Death Certificate

*For Traditional, SEP and SIMPLE IRAs - If the IRA owner was subject to required minimum distributions (RMD) payout [age 70 ½ or older], we will distribute any remaining RMD amounts due to the owner for the year of death as a single distribution payable to the beneficiary(ies) under their Social Security Number (or Tax ID) as required by the Internal Revenue Service (IRS).

BENEFICIARY INFORMATION

In my capacity, I am requesting my portion of the decedents IRA be transferred into an inherited IRA, or liquidated as instructed. This request is made in accordance to the IRA owner's beneficiary designation or under the terms of the beneficiary default provisions (spouse, or if no surviving spouse then the estate). If you are a spouse beneficiary please complete the Spouse Beneficiary – IRA Inheritance Request Form. (Please print)

▲ First Name

▲ Middle Initial

▲ Last Name

Select one:

Non-Spouse (person) beneficiary (including beneficiary under small estate waiver)

▲ Social Security Number

Executor or personal representative for the estate

▲ Name of Estate

▲ Estate's Tax ID (decedent's Social Security Number is not valid**)

Responsible individual on behalf of a minor beneficiary

▲ Social Security Number

▲ Date of Birth

▲ Minor's Name

▲ Social Security Number

▲ Date of Birth

NON-SPOUSE, TRUST, ESTATE OR ENTITY BENEFICIARY IRA INHERITANCE REQUEST FORM

Trustee(s) of the named trust

▲ Trustee(s) Name	▲ Trust's Tax ID (decedent's Social Security Number is not valid**)
▲ Trust Registration	▲ Date of Trust

Other (such as charitable organization or foundation)

▲ Entity	▲ Entity's Tax ID (decedent's Social Security Number is not valid**)
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IMPORTANT: INHERITANCE ELECTION (Page 2) - If you are requesting the proceeds be transferred to an inherited IRA for life expectancy, systematic, partial or future year distributions, please complete the AMG Funds NON-SPOUSE, TRUST, ESTATE OR ENTITY INHERITED IRA ACCOUNT APPLICATION AND ADOPTION AGREEMENT. Proceeds will be transferred into the same investment fund(s). (Exchange privileges are available once the transfer is complete.)

**Refer to IRS Form SS-4 – Application for Employer Identification Number

INHERITANCE ELECTION

LIQUIDATE IN FULL (entire balance) - All distribution checks are issued in the name and tax ID of the non-spouse beneficiary, trust, estate or entity. Distributions will not be made payable to the underlying separate beneficiaries of a trust or estate or paid to third parties. Proceed to LIQUIDATION INSTRUCTIONS and TAX WITHHOLDING ELECTION sections.

ESTABLISH AN INHERITED IRA ACCOUNT with the attached application for the purposes of maintaining the inherited proceeds for life expectancy, systematic, partial or future year inheritance distributions (reported on IRS Form 1099-R, under Code 4 - death distribution). Please complete and attach an AMG Funds NON-SPOUSE, TRUST, ESTATE OR ENTITY INHERITED IRA ACCOUNT APPLICATION AND ADOPTION AGREEMENT. The inherited proceeds will be transferred into the same investment fund(s). (Exchange privileges are available once the transfer is complete.)

Note: To establish required minimum life expectancy distributions, also complete the AMG Funds INHERITED IRA DISTRIBUTION REQUEST FORM.

LIQUIDATION INSTRUCTIONS

Mail to the following address (please print) _____

Electronic Funds Transfer - to a bank or credit union account (attach a voided check or savings deposit slip)

Bank Routing Number _____ Bank Account Number _____ Checking Savings

TAX WITHHOLDING ELECTION

Federal Tax Withholding Election

Generally, IRA distributions are subject to 10% withholding unless you elect to have an additional amount withheld or elect to have no withholding. You may make a withholding election by selecting one of the options below.

Please select one of the following:

Do not withhold Federal Income Tax

Withhold 10% Federal Income Tax

Withhold _____% Federal Income Tax (must be greater than 10%)

Caution: Even if you elect not to have Federal Income Tax withheld, you are liable for payment of Federal Income Tax on the taxable portion of your distribution. You also may be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding, if any, are not adequate.

NON-SPOUSE, TRUST, ESTATE OR ENTITY BENEFICIARY IRA INHERITANCE REQUEST FORM

State Withholding

Your state of residence will determine your state income tax withholding requirements, if any. Those states with mandatory withholding will require state income tax to be withheld from payments if federal taxes are withheld or may mandate a fixed amount regardless of your federal tax election. Voluntary states let individuals determine whether they want state taxes withheld. Some states have no income tax on retirement payments. You may wish to consult with a tax advisor or your state's tax authority for additional information on your state requirements.

I elect **TO NOT** have state income tax withheld from my retirement account distributions (only for residents of states that do not require mandatory state tax withholding).

I elect **TO** have the following dollar amount or percentage from my retirement account distribution withheld for state income taxes (for residents of states that allow voluntary state tax withholding). \$ _____ or _____ %

As required by federal law, I certify that: (1) The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and (2) I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to back-up withholding, and (3) I am a U.S. person (including a U.S. resident alien). You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. (4) The FACTA code(s) entered on this form (if any) indicating that I am exempt from FACTA reporting is correct. Exemption from FACTA reporting code (if any) _____

"The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding."

SIGNATURE (Required)

▲ **Signature (s) Beneficiary, Executor, Responsible Individual, Trustee(s) or Authorized Representative** ▲ **Date**

***MEDALLION STAMP IS REQUIRED TO TRANSFER OWNERSHIP**

***Medallion Guarantee**
 Beneficiary capacity is maintained by the custodian as part of the original IRA owner's account records and the guarantor is not certifying the beneficiary status.
 Medallion Signature Guarantee Stamp and Signature (If required by your current custodian or transfer agent): An eligible guarantor is a domestic bank or trust company, securities broker/dealer, clearing agency or savings association that participates in a medallion program recognized by the Securities Transfer Agents Association. The three recognized medallion programs are the Securities Transfer Agents Medallion Program (known as STAMP), Stock Exchanges Medallion Program (SEMP), and the Medallion Signature Program (MSP). A notarization from a notary public is NOT an acceptable substitute for a signature guarantee.