SEI Private Trust Company

SEI Account Number: ____________________

Internal Use Only: Scan as RMD Cancellation

Required Minimum Distribution (RMD) Cancellation Form

Instructions

Complete this form to cancel a scheduled RMD distribution from an Individual Retirement Account ("IRA") at SEI Private Trust Company ("SPTC"). The advisor's signature is required to cancel the distribution request.

Note: *Requests received within five business days of the distribution date will cause only the scheduled distribution to be cancelled; any trades created to cover the distribution will already be in progress. You may leave the proceeds from the settled trades in the account to re-balance (if the account has a strategy), submit a self-service rebalance action to re-balance immediately, or submit a self-service Create Trade Set action.*

After the RMD has been deleted, you can re-establish the RMD for 2021 via Self-service functionality on ADE. This is available by going to the Business Tab and selecting the RMD dashboard, then selecting the "Disburse Cash" option for a specific client on **SEIAdvisorCenter.com**.

This form should be submitted electronically via **SEIAdvisorCenter.com** by selecting Actions > Manage Forms. For additional contact information, please select Help > Resources > Contact SEI from the home page of **SEIAdvisorCenter.com**.

1 Advisor Information

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Advisor's Name

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Advisor's Telephone Number

2 Investor Information

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Investor's Name

3 RMD Cancellation

☐ I wish to cancel the scheduled RMD for the above-mentioned account.

4 Signature

The undersigned certifies that the information provided is accurate and hereby authorize SPTC, upon receipt of this request, to cancel a previously requested distribution from the account as instructed on this form. Further, it is agreed that SPTC, its parent and affiliates, will not be liable for any loss, liability, cost, or expense for acting as directed in this request.

By submitting this form, you are confirming that you verbally communicated with your client and confirmed the validity of this request.

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Advisor's Signature *(required)*