NovaIRA Distribution Checklist

NovaIRA will not be able to process your Distributions Forms until all three forms are received in Good Order. When completing the forms, please use the checklist below to verify that the forms are completed correctly and are ready for processing before you submit them.

NovaIRA Distribution Form

☐ Account Information – Please put your full name in Account Owner Name and add SSN in the provided sections

☐ Reason for Distribution- Please select the situation that pertains to you best

☐ Tax Withholding- Please read the Notice of Withholding. You must make an elect for federal and state tax withholding, if applicable. Please Note: Rollovers are not subject to tax.

☐ Method of Payment- Please choose how you would like to receive your funds. By default, a check will be sent to your address on record.

- For ACH (direct deposit) or Fed Wire, please provide ABA# (routing number) , Bank Name, Bank Account Number, Bank Account Name, and Type of Account (Checking or Savings)
- For Rollover check, please provide name of institution, address of institution, and account number (if applicable)
- For Rollover check, sent to an Employer Qualified Plan, the plan name and number is required.

☐ Authorization and Signature- Please sign using full name (as shown on driver's license) in Account Owner Name section and signature. Please include date.

MATC IRA Supplement Form

☐ Acknowledgment of Receipt- please sign using full name (as shown on driver's license) and include date

MATC Custodial Agreement

☐ Section 1.1- Account Registration, choose your account type (Traditional [pre-tax], Roth, or Rollover)

☐ Section 1.2- Participant Information: Is all information correct and legible?

- Your email address is required to have online MATC account access
- Your SSN or TIN is necessary in this section, even if you have supplied it elsewhere

☐ Section 6- Authorized Signatures, please sign using full name (as shown on driver's license) in Account Owner 1 section

In order to finish processing your distribution request, additional documents are required.
Please see the next page for more information.

NovaIRA Distribution Checklist

Additional Document: Account Owner Verification

- [ ] Before we can release your funds, we must verify your identity. The best way to do this is to have a copy of your Driver's License. Please email photos or scans of the **front and back** of your current driver's license.

- [ ] If your driver's license shows a different address than what you put in the "mailing address" section of the Custodial Agreement form, please email a photo or scan of a **utility bill** showing your name and matching address.

- [ ] If you submit a passport of SS card, we will also need a copy of your last W-2 or W-9 form.

Additional Document: For ACH (direct deposit) ONLY

- [ ] If you would like your distribution sent via ACH (direct deposit) instead of a check, please email a photo or scan of a **voided check** with your name on it to confirm routing information.

- [ ] If you are unable to provide a void check, some banks also provide direct deposit forms as well. Please email a photo or scan of the direct deposit form. Please make sure this form has your bank name, your name, the routing

Please email the required additional documents to distributions@mynovaira.com for fastest processing. You can also submit for processing by fax to (713)-979-0508 or mail to 10777 Freeway, Suite 440, Houston TX 77092.