



Qualified charitable distribution request

Before you begin

You can also complete this form entirely online.

- Visit the forms page at johnhancock.com/annuities.
- Find the Qualified charitable distribution request form.
- Click the link to submit online and follow the step-by-step instructions.

Important information

Use this form to make a qualified charitable distribution (QCD) from your traditional IRA or Roth IRA.

- The distribution check must be made payable and mailed directly to the charitable organization.
- The \$111,000 limit is the aggregate amount of the qualified distributions made from all of your IRAs.
- If you make any **deductible** IRA contributions for a tax year ending on or after the date you reach age 70½, such contributions will reduce the amount of any QCD you can exclude from gross income.
- Amounts withdrawn over your required minimum distribution or allotted penalty-free amount (including interest) may be subject to withdrawal charges. Please review your prospectus and/or contract/certificate for further details regarding the impact of withdrawals.
- Please confirm that the organization you designate is eligible to receive QCDs, as John Hancock is not responsible for making this determination.
- John Hancock may furnish a copy of this document to the named organization. Please retain a copy for your own records and contact the charitable organization directly for a gift receipt.
- Consult with your own tax professional if you have any questions about this or any other tax matter.

Contact information



Website:
johnhancock.com/annuities



Phone:
800-344-1029



Mail:
See return instructions at end of this form.



1. Contract information

Contract number

Owner information:

Owner name (First) MI Last Date of birth (mm/dd/yyyy)

Social Security number (or TIN) Phone number Email address

Address (Street)

City State Zip code Country (if outside the U.S.)

☐ Check here if address provided is permanent address change for your annuity contracts.

Financial professional name (if applicable) (First) MI Last Phone number

2. Qualified charitable distribution information

Enter the information below to make direct charitable distributions from your John Hancock IRA and request that the organizations named below memorialize your name and address provided in section 1 as the donor of record in connection with this transfer. **You may list up to five charitable organizations below. If you wish to donate to more than five charities, please attach a letter of instruction or make a copy of this section of the form.**

1. Legal name of charity TIN

Attention Phone number

Address (Street)

City State Zip code Country (if outside the U.S.)

Withdraw the following amount: (select one)

☐ Required minimum distribution (RMD) amount for the current year (this option is not available to Roth IRAs or RMDs already and only applicable if you are distributing to **one** charity)

☐ Other amount (total amongst charities cannot exceed \$111,000): \$

2. Legal name of charity TIN

Attention Phone number

Address (Street)

City State Zip code Country (if outside the U.S.)

Withdraw amount (total amongst charities cannot exceed \$111,000): \$

3. Legal name of charity TIN

Attention Phone number

Address (Street)

City State Zip code Country (if outside the U.S.)

Withdraw amount (total amongst charities cannot exceed \$111,000): \$



2. Qualified charitable distribution information (continued)

4. _____
 Legal name of charity _____ TIN _____

 Attention _____ Phone number _____

 Address (Street) _____

 City _____ State _____ Zip code _____ Country (if outside the U.S.) _____
Withdraw amount (total amongst charities cannot exceed \$111,000): \$ _____

5. _____
 Legal name of charity _____ TIN _____

 Attention _____ Phone number _____

 Address (Street) _____

 City _____ State _____ Zip code _____ Country (if outside the U.S.) _____
Withdraw amount (total amongst charities cannot exceed \$111,000): \$ _____

3. Signature and authorization

By signing below, I certify that I am the owner of the above-referenced IRA contract and that I am age 70½ or older. I understand that the amount distributed will be reported as a normal distribution on IRS Form 1099-R. I acknowledge that it is my responsibility to ensure that the requirements for a qualified charitable distribution (QCD) are met. I authorize John Hancock to process this request and distribute the amounts listed above directly to the qualified charities.

Certification required of U.S. persons only (including U.S. citizens, U.S. resident aliens, or other U.S. persons).

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number,
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 a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person, including a U.S. resident alien (as defined in the IRS Form W-9 instructions).

Certification instructions: You must check the box below 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.

☐ I am subject to backup withholding as a result of a failure to report all interest and dividends.

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

SIGN HERE _____
 Signature of owner (or fiduciary) _____ Date signed (mm/dd/yyyy) _____

Return instructions

Please submit your completed and signed form via one of the following:

**National contracts:**

John Hancock Annuities Service Center
 PO Box 55444
 Boston, MA 02205-5444

New York contracts:

John Hancock Annuities Service Center
 PO Box 55445
 Boston, MA 02205-5445

All overnight mail:

Annuities Service Center
 John Hancock Insurance
 372 University Avenue, Suite 55444
 Westwood, MA 02090

**Register online:**

Go to johnhancock.com/annuities to create an online account and gain access to contract-specific details and self-service tools. Once registered, select to receive your contract documents electronically under your Paperless settings.

