Reset form

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 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 directly to the charitable organization.
- The $100,000 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- Amounts withdrawn over your required minimum distribution or allotted penalty-free amount (including interest) may be subject to withdrawal charges.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
TTY: 800-555-1158

Mail: See return instructions at end of this form.

1. Contract information

Contract number

Owner information:

Owner's name (First) | MI | Last | Date of birth (MM/DD/YYYY)

Social Security number (or TIN) | Phone number | Email address

Address (Street) ☐ Please check if the address provided is a permanent address change for all your annuity contract(s).

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

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

Contract number: ____________________

2. Qualified charitable distribution information

Enter the information below to make a direct charitable distribution from your John Hancock IRA and request that the organization named below memorialize your name and address provided in section 1 as the donor of record in connection with this transfer.

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 distributed)

☐ Other amount (not to exceed $100,000.00): $ ____________________

Legal name of charity ____________________ TIN ____________________

Attention ____________________ Phone number ____________________

Address (Street) ____________________

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

3. Signature and authorization

By signing below, I hereby certify the information on this form is correct and accurate. I also authorize John Hancock to make the distribution in accordance with my designation as noted and to provide a copy of this form to the organization identified in section 2. I understand that this request is subject to all the terms and conditions of the contract/certificate and prospectus. I also understand that once this distribution is made and released by John Hancock, it will not be reinstated to this contract/certificate. I direct John Hancock to make the disbursement in accordance with the designation on this form. Furthermore, I certify that the taxpayer identification number of the organization identified in section 2 of this form is correct, and I confirm that the organization is eligible to receive QCDs. I acknowledge that any distribution or full surrender of my annuity contract/certificate may result in a surrender charge and that I may lose certain benefits if this contract does not have a reinstatement provision. I also certify that this distribution is in accordance with the provisions of the Tax Increase Prevention Act of 2014 and Section 408(d)(8) of the Internal Revenue Code of 1986, as amended.

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) ____________________ Today's date (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
410 University Avenue, Suite 55444, Westwood, MA 02090

Fax: 617-663-3160

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.