



Use this form to redeem assets from a **non-retirement** Touchstone account. Incomplete information will result in delays in processing your request. All required documentation must be received in good order before the withdrawal request can be honored. All legal documents must be certified and a Medallion Signature Guarantee may be required. Please see the Signature section for an explanation of the Medallion Signature Guarantee. If you need assistance completing this form, please contact Shareholder Services at 800.543.0407, weekdays between 8:30 a.m. and 7:00 p.m. eastern time.

**(Complete all sections)**

**1 ACCOUNT INFORMATION**

- Individual or Joint   
  Sole Proprietorship   
  Trust   
  Corporation or Partnership  
 Uniform Gift or Uniform Transfer to Minor (UGMA or UTMA)

Account Number \_\_\_\_\_

**1a ACCOUNT OWNER INFORMATION**

*Please Print*

Account Registration \_\_\_\_\_

Street Address \_\_\_\_\_

Daytime Telephone Number \_\_\_\_\_

City \_\_\_\_\_

Evening Telephone Number \_\_\_\_\_

Social Security or Taxpayer ID Number on Current Account \_\_\_\_\_

State \_\_\_\_\_ Zip Code \_\_\_\_\_

If the account owner is deceased, please provide the below information:

Deceased Account Owner's Name \_\_\_\_\_

Account Owner's Date of Death \_\_\_\_\_

Payee's Name \_\_\_\_\_

Social Security/Tax ID No. \_\_\_\_\_

Street Address \_\_\_\_\_

Telephone Number \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip Code \_\_\_\_\_

E-mail Address \_\_\_\_\_

Note: If the account owner is deceased, please contact Shareholder Services at the phone number above for further document requirements if you have not already done so. In cases of death, an Inheritance Tax Waiver may also be required, depending on the decedent's state of residence. If there are multiple beneficiaries and one beneficiary is deceased, we require a letter of instruction that provides the date of the beneficiary's death and the letter must be signed by one of the surviving beneficiaries with a Medallion Signature Guarantee (MSG) Stamp or a Signature Validation Program (SVP) Stamp. We would also accept a certified copy of the death certificate for the deceased beneficiary.

**2 DISTRIBUTION METHOD**

(Complete A, B and C)

**A. Choose one:**  Liquidate Entire Account  Partial Withdrawal – Dollar Amount \$ \_\_\_\_\_ or # of Shares \_\_\_\_\_

\*If the value of your redemption is more than \$100,000 per fund, a Medallion Signature Guarantee is required in Section 3 of this form.

**B. Distribute from:**

\_\_\_\_\_  
Fund Name: All/Dollar/Share Amount (circle one)

\_\_\_\_\_  
Fund Name: All/Dollar/Share Amount (circle one)

\_\_\_\_\_  
Fund Name: All/Dollar/Share Amount (circle one)

**C. Delivery Instructions:**

- Mail to the address of record**
- Mail to the following address** – \*Medallion Signature Guarantee required if payable to a 3rd party and/or mailed to address other than address of record (See Section 3).

\_\_\_\_\_  
Attention: For the Benefit of

\_\_\_\_\_  
Street

\_\_\_\_\_  
City State Zip Code

- Transfer funds via ACH to bank information on file**
- Transfer funds via ACH to new bank instructions (voided check and Medallion Signature Guarantee required.)\***

\_\_\_\_\_  
Name of Institution: For the Benefit of

\_\_\_\_\_  
Address: Routing and Account Number

\*Medallion Signature Guarantee may be obtained at your local bank or trust company, securities broker/dealer, clearing agency or savings association. (See Section 3)

**3 SHAREHOLDER AUTHORIZATION**

I authorize the withdrawal as noted above from my Touchstone Investments account and authorize Touchstone Investments and BNY Mellon Asset Servicing to process this request on my behalf. I have read and understand all information on this form and hereby provide the applicable authorization.

I understand that I must carefully review each account confirmation statement or other documentation that I receive to ensure that my instructions have been properly acted upon. If any discrepancies are noted, I agree to notify Touchstone, the Fund or the Transfer Agent in a timely manner, but in no event more than 15 days from receipt of such account confirmation statement. Failure to notify one of the above entities in a timely manner will relieve such entities of any liability with respect to the account change.

**Under penalties of perjury, I (we) certify that:**

- 1. The number shown on this form is my (our) correct taxpayer identification number(s) and**
- 2. I am (We are) not subject to backup withholding because:**
  - a. I am (We are) exempt from backup withholding; or**
  - b. I (We) have not been notified by the Internal Revenue Service (IRS) that I am (we are) subject to backup withholding as a result of a failure to report all interest or dividends; or**
  - c. The IRS has notified me (us) that I am (we are) no longer subject to backup withholding; and**
- 3. I am (We are) a U.S. citizen or other U.S. person (as defined in the Form W-9 instructions found at www.irs.gov).**
- 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.**

**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.**

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

**Important: If you are acting on behalf of the account owner, please indicate the capacity in which you are acting by checking the appropriate box below. If the correct box is not listed, please check "Other" and specify your capacity.**

- Administrator     Custodian     Surviving Joint Owner     Agent under POA
- Executor     Trustee     Conservator/Guardian     Other, please specify \_\_\_\_\_

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.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Additional Account Owner Signature

\_\_\_\_\_  
Date

**Place Medallion Guarantee Stamp Here (if required)**

**Place Medallion Guarantee Stamp Here (if required)**

**Mail to the following:**

**First Class Mail:**  
Touchstone Investments  
P.O. Box 534467  
Pittsburgh, PA 15253-4467

**Overnight Mail:**  
Touchstone Investments  
Attention: 534467  
500 Ross Street, 154-0520  
Pittsburgh, PA 15262  
800.543.0407

**Customer Service:**  
800.543.0407