



# Systematic Withdrawal Plan Request Form

Use this form to establish a Systematic Withdrawal Plan ("SWP") on your Dunham Funds account. **Note:** Do **not** use this form to request a withdrawal plan for an IRA account. To set up a withdrawal plan for an IRA account, please complete an *IRA Distribution & Withholding Election Form*, which can be obtained by calling 888-3-DUNHAM. For additional information, please call 888-3-DUNHAM.

## 1. ACCOUNT REGISTRATION

**Note:** All registered owners/trustees must sign in Section 3.

Please provide your primary legal address, in addition to any mailing address (if different).

Owner's Name (First, Middle, Last)

Taxpayer ID Number or Social Security Number

Joint Name (if applicable)

Taxpayer ID Number or Social Security Number (if applicable)

Account Number

Daytime Phone Number

Street Address

Evening Phone Number

City, State, Zip

Email Address

## 2. SYSTEMATIC WITHDRAWAL PLAN

**I authorize electronic funds transfers through the Automated Clearing House (ACH) for this account as indicated below. To take advantage of this service, your financial institution must accept ACH transactions. I understand that there is no charge for this service from the Fund or its transfer agent, although my bank may have charges that apply, and I may cancel upon 30 days written notice to the address listed at the bottom of this form.**

### WITHDRAWAL OPTIONS

Asset Allocation Program Model or  Money Market Specify Dollar Amount: \$\_\_\_\_\_

Frequency (choose one):

Monthly  Semi-Monthly  Quarterly  Annually  Semi-Annually

Start Date: Month \_\_\_\_\_ Day \_\_\_\_\_ (If no day is specified, distributions will be made on the 25<sup>th</sup> day of the month or the following business day if the 25<sup>th</sup> falls on a weekend or holiday). We must receive this form at least 5 business days prior to the day when the distributions are to begin. If you already have instructions on file, this will replace your existing instructions.



