



**DOMESTIC ABUSE AND DISASTER  
SELF-CERTIFICATION FORM**

**Domestic Abuse Distribution Self-Certification**

Name	SSN	DOB
Plan Employer/Sponsor	Email	Phone
Investment Company	Account Number	Amount Requested

I certify that:

- This distribution qualifies as an eligible distribution to a domestic abuse victim under 26 U.S.C. § 72(t)(2)(K).
- I understand that to be eligible for a domestic abuse distribution, I must have experienced domestic abuse by a spouse or domestic partner. Domestic abuse is defined as “physical, psychological, sexual, emotional, or economic abuse, including efforts to control, isolate, humiliate, or intimidate the victim, or to undermine the victim’s ability to reason independently, including by means of abuse of the victim’s child or another family member living in the household.”
- This distribution is made during the one-year period beginning on any date on which I was a victim of domestic abuse (defined above) by a spouse or domestic partner.
- I understand that the amount of a domestic abuse distribution is limited to the lesser of \$10,000 (indexed for inflation) or 50% of my account balance.
- I understand that a domestic abuse distribution is taxable.

Participant Signature

Date



**DOMESTIC ABUSE AND DISASTER  
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**Disaster Self-Certification**

Name \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_

Plan Employer/Sponsor \_\_\_\_\_ Email \_\_\_\_\_ Phone \_\_\_\_\_

***Qualified Distribution Recovery Distribution***

Investment Company \_\_\_\_\_ Account Number \_\_\_\_\_ Amount Requested \_\_\_\_\_

I certify that:

- I am eligible to receive a qualified disaster recovery distribution under 26 U.S.C. §§ 72(t)(2)(M) & 72(t)(11).
- I understand that to be eligible for a qualified disaster recovery distribution, my principal residence at any time during the incident period of the qualified disaster must have been located within a federally-declared disaster area and I must have experienced economic loss as a result of the disaster.
- The applicable [federally-declared disaster](#) is: \_\_\_\_\_.
- This distribution is made within 180 days of the later of the beginning of the disaster incident period or the date of the disaster declaration.
- I understand that the maximum amount of all qualified disaster distributions from all my plans and IRAs is \$22,000 for a particular disaster.
- I understand that a qualified disaster distribution is taxable.

Participant Signature \_\_\_\_\_ Date \_\_\_\_\_

***Qualified Disaster Loan***

Investment Company \_\_\_\_\_ Account Number \_\_\_\_\_ Amount Requested \_\_\_\_\_

I certify that:

- I am eligible to receive a qualified disaster loan under 26 U.S.C. § 72(p)(6).
- I understand that to be eligible for a qualified disaster loan, my principal residence at any time during the incident period of the qualified disaster must have been located within a federally-declared disaster area and I must have experienced economic loss as a result of the disaster.
- The applicable [federally-declared disaster](#) is: \_\_\_\_\_.
- This loan is made within 180 days of the later of the beginning of the disaster incident period or the date of the disaster declaration.
- I understand that the maximum amount of the loan is \$100,000.

Participant Signature \_\_\_\_\_ Date \_\_\_\_\_