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The Coronavirus is one of the qualified 2020 disasters reportable on Form 8915-E. If you were impacted by the coronavirus and you made withdrawals from your retirement plan in 2020 before December 31, you may have coronavirus-related distributions eligible for special tax benefits on Form 8915-E. Listed below are the requirements that must be met for a distribution to qualify as a “Coronavirus-related Distribution.” Please read all of the information below.

A coronavirus-related distribution is a retirement plan distribution that was made:

1. In 2020 before December 31, 2020; and
2. To a qualified individual.

Qualified Individuals. You are a qualified individual if you are an individual meeting any of the following criteria.

1. You were diagnosed with the virus SARS-CoV-2 or with coronavirus disease 2019 (referred to collectively in these instructions as coronavirus) by a test approved by the Centers for Disease Control and Prevention (including a test authorized under the Federal Food, Drug, and Cosmetic Act).
2. Your spouse or dependent (as defined in section 152) was diagnosed with coronavirus by a test approved by the Centers for Disease Control and Prevention (including a test authorized under the Federal Food, Drug, and Cosmetic Act).
3. You experienced adverse financial consequences as a result of you, your spouse, or a member of your household (as defined next):
 - Being quarantined, being furloughed or laid off, or having work hours reduced due to coronavirus.
 - Being unable to work due to lack of childcare due to coronavirus.
 - Having to close or reduce the hours of a business you, your spouse, or a member of your household owned or operated due to coronavirus; or
 - Having a reduction in pay (or self-employment income) due to coronavirus or having a job offer rescinded or start date for a job delayed due to coronavirus.

Member of your household. For purposes of determining whether you are a qualified individual, anyone who shares your principal residence is a member of your household.

I agree that I have read the information above in its entirety and certify that my distribution qualifies as Coronavirus-related Distribution.

Print: _____ Sign: _____ Date: _____

Print: _____ Sign: _____ Date: _____