IRA WITHDRAWAL STATEMENT

Weitz | INVESTMENT MANAGEMENT

MAILING ADDRESS
Weitz Funds
PO Box 46707
Cincinnati, OH 45246

OVERNIGHT MAILING ADDRESS
Weitz Funds
225 Pictoria Dr, Suite 450
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clientservices@weitzinvestments.com

Use this form to make a one-time withdrawal or to establish a Systematic Withdrawal Plan (SWP) for your Weitz IRA account. Please type or print clearly. You may also make a withdrawal or establish a SWP through our web portal at www.weitzinvestments.com.

1. Account Information

Account Registration

Account Number

SSN ☐☐☐☐☐☐☐☐☐

Birth Date (MM-DD-YYYY) ☐☐-☐☐-☐☐☐☐

Type of IRA: ☒ Traditional IRA ☐ Roth IRA ☐ SEP IRA ☐ Inherited IRA

Complete the following only if you are a Beneficiary requesting a withdrawal.

Name

SSN ☐☐☐☐☐☐☐☐☐

Birth Date (MM-DD-YYYY) ☐☐-☐☐-☐☐☐☐

Mailing Address

City

State

ZIP

Home Phone

Work Phone

2. Distribution Reason

I direct the Custodian to make a distribution from the above account for the following reason:

☐ **Early Distribution** | Accountholder under age 59 ½ - you may be subject to the early distribution penalty unless an exception applies

☐ **Early Distribution** | Accountholder under age 59 ½ taking substantially equal periodic payments

☐ **Death** | Beneficiary of this account who furnishes a copy of the Death Certificate

☒ **Normal Distribution** | Accountholder over age 59 ½, including Required Minimum Distribution

☐ **Removal of Excess Contribution** | Was the contribution made in a prior year? ☐ No ☐ Yes, Tax Year: _____

Is the contribution being removed prior to the tax return due date of the year for which the contribution was made? ☐ No ☐ Yes

☐ **Recharacterization**

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3. One-Time Distribution Instructions

Amount:

☐ Entire Balance

☐ $ _____

☐ Calculate the Required Minimum Distribution (RMD) for me ☐ one time ☐ annually

From Fund:

☐ _____
Fund Name / Number

☐ Proportionally across all funds in the account

4. Method of Payment / Bank Information

Payment method: ☐ Send a check to the address of record ☐ ACH to existing bank instructions ☐ ACH to new bank instructions (provide information below)

☐ Distribute to existing Weitz Account: _____ Fund Number _____ Account Number

_____
Bank Name

_____ _____ _____ _____
Bank Address City State ZIP

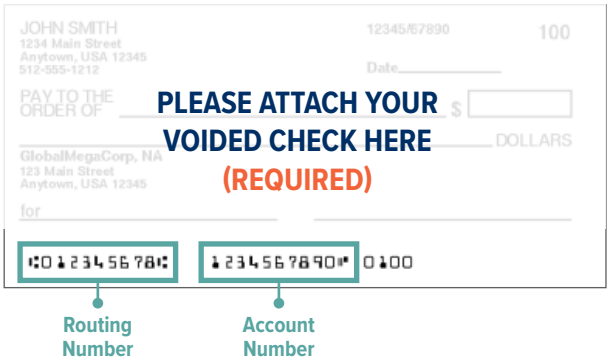
_____
Name(s) on Bank Account

_____ _____
Bank Account Number Bank Routing Number

Type of Account

☐ Checking Account

☐ Savings Account



Your check must be preprinted with your name and address.

If you do not have a preprinted check, please provide documentation from your bank that confirms your bank account registration, account number and routing number.

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5. Systematic Withdrawal

- Enter the dollar amount for each fund in which you wish to establish a SWP.
- If no day or frequency is chosen, redemptions will be made from the selected fund(s) on the 22nd day of each month.
- If any weekends or holidays occur on the selected days, the redemptions will be made on the previous business day. ACH processing takes approximately two (2) business days to complete.

Fund	$ Amount	Day of the Month				Frequency				Beginning (Month / Year)
		1st	8th	15th	22nd	Monthly	Quarterly	Semi-Annually	Annually	
Large Cap Equity Fund / WVALX & WVAIX / 328 & 541		☐	☐	☐	☐	☐	☐	☐	☐	/
Multi Cap Equity Fund / WPVLX & WPVIX / 331 & 562		☐	☐	☐	☐	☐	☐	☐	☐	/
Partners III Opportunity Fund / WPOPX & WPOIX / 310 & 436		☐	☐	☐	☐	☐	☐	☐	☐	/
Conservative Allocation Fund / WBALX & WBAIX / 400 & 540		☐	☐	☐	☐	☐	☐	☐	☐	/
Short Duration Income / WEFIX & WSHNX / 329 & 437		☐	☐	☐	☐	☐	☐	☐	☐	/
Core Plus Income Fund / WCPBX & WCPNX / 573 & 574		☐	☐	☐	☐	☐	☐	☐	☐	/
Ultra Short Government Fund / SAFEX / 330		☐	☐	☐	☐	☐	☐	☐	☐	/

6. Tax Withholding Election

Federal Withholding

Completion and execution of this form, including any federal withholding election made herein, obviates the need to complete a separate Internal Revenue Service Form W-4R. However, a copy of IRS Form W-4R with instructions is attached for your reference.

Your withholding rate is determined by the type of payment you will receive.

For nonperiodic payments, the default withholding rate is 10%. You can choose to have a different rate by entering a rate between 0% and 100% below. Generally, you can't choose less than 10% for payments to be delivered outside the United States and its possessions. (See the attached Form W-4R for more information).

Complete this section if you would like a rate of withholding that is different from the default withholding rate. See the instructions and the Marginal Rate Tables that follow for additional information. Enter the rate as a whole number (no decimals).

Withhold _____ %

If no withholding information is included, we will automatically withhold the default withholding percentage elected on your account. If you do not have a default withholding election on your account and the above information is left blank, we will automatically apply 10% default withholding to your requested distribution (Federal and State taxes will not be withheld when recharacterizing contributions). Federal taxes will not be withheld from ROTH IRA Distributions unless requested above.

State Withholding

Your state of residence will determine your state income tax withholding requirements, if any. Those states with mandatory withholding may require state income tax to be withheld from payments if federal income taxes are withheld or may mandate a fixed amount regardless of your federal tax election. Voluntary states let individuals determine whether they want state taxes withheld. Some states have no income tax on retirement payments. Please consult with a tax advisor or your state's tax authority for additional information on your state requirements.

Name of WIthholding State: _____

☐ **Withhold** _____ %

☐ **Do Not Withhold State Income Tax**

NOTE: State income tax withholding may not be available for all states. If applicable, mandatory state income tax will be withheld from the distribution in accordance with state tax guidelines.

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7. Signature

I certify that I am the proper party to receive payment(s) from this IRA and that all information provided by me is true and accurate. I have read and understand the Rules and Conditions Applicable to Withdrawal on the reverse side of this form and agree to abide by those rules and conditions. I further certify that no tax advice has been given to me by the Custodian or Weitz Funds. All decisions regarding this withdrawal are my own. I expressly assume the responsibility for any adverse consequences which may arise from this withdrawal and I agree that neither the Custodian nor Weitz Funds shall in any way be held responsible.

If this document is signed electronically, I consent to be legally bound by this document and subsequent terms governing it. The electronic copy of this document should be considered equivalent to a printed form in that it is the true, complete, valid, authentic and enforceable record of the document, admissible in judicial or administrative proceedings. I agree not to contest the admissibility or enforceability of the electronically stored copy of this document. Note that this document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.

I understand that if new bank information is established on my Weitz Funds account, there will be a 15-day waiting period before the new bank information can be used for a redemption request. **If, for any reason, I require a redemption within the 15-day waiting period, I understand that a Letter of Instruction with Medallion Signature Guarantee must accompany this document** (please call 1-888-859-0698 for assistance).

X _____

Signature of Owner or Beneficiary **Date**

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GENERAL INFORMATION

You must supply all requested information so the custodian can do the proper tax reporting. You may not request a distribution on behalf of another beneficiary.

DISTRIBUTION INFORMATION

If you are establishing periodic distributions from your IRA, you must:

1. Give the custodian the discretion to withdraw the funds from any investment instrument if you fail to indicate from which investment instrument amounts are to be withdrawn.
2. Continue receiving distributions in the instructed manner until: (a) you furnish the custodian new written instructions, (b) your death, or (c) your account is depleted, whichever occurs first.

DISTRIBUTION INFORMATION

You are required to give the reason for taking the withdrawal from the IRA.

1. If you are under 59½ and take a distribution from your IRA, you may be subject to the early distribution penalty. There are several exceptions to the early distribution penalty. You may not have to pay the 10% penalty if you are in one of the following situations:
   - You have unreimbursed medical expenses that are more than 7.5% of your adjusted gross income.
   - The distributions are used to purchase medical insurance while you are unemployed and able to meet other qualifying conditions.
   - You are disabled.
   - The distributions are not more than your qualified education expenses.
   - You use the distributions (up to $10,000) to buy, build, or rebuild a first home.
   - Qualified Reservist Distributions.

   Please refer to IRS publication 590 or consult your tax advisor to determine if you qualify for one of the above exceptions.
2. If you are under 59½, certain distributions from your IRA in the form of "substantially equal periodic payments" may qualify for an exception to the early distribution penalty. In addition, direct conversions to a Roth IRA and distributions used to satisfy an IRS levy of the IRA are exempt from the early distribution penalty.
3. If you are requesting a distribution as a beneficiary, you must furnish proof, in a form acceptable to the custodian, to verify your entitlement to receive the distribution. Distributions paid to a beneficiary or to the IRA holder's estate are exempt from the 10% penalty tax.
4. If you are age 59½, you may take distributions at any time you wish from your Traditional IRA without incurring an IRS penalty. If this is a Traditional IRA, you are responsible for taking the annual required minimum distribution upon attainment of age 70½. You must pay the IRS a 50 percent penalty tax if you fail to take the required minimum distribution on time. If you are over age 59½ and otherwise qualify, your Roth IRA distributions are not included in your gross income.
5. If you have made an excess contribution to your IRA, you must take the appropriate steps to remove or redesignate the distribution. Depending upon when you take the necessary corrective action and the amount of the excess contribution, you may have to pay the IRS either an excess contribution or early distribution penalty tax, or both.
6. If you make a contribution to your Traditional/Roth IRA, you may recharacterize the amount by transferring it plus the earnings attributable to a Roth/Traditional IRA before your tax return due date (including extensions) for such year. Recharacterization may also be used, as described above, to reverse a Traditional IRA to Roth IRA conversion.

If this is a Traditional IRA, you must include all amounts you receive from the IRA in your gross income except amounts attributable to nondeductible contributions and amounts rolled back into a Traditional IRA or an employer's qualified plan.

If this is a Roth IRA, you must include all earnings you receive from the Roth IRA in your gross income unless you receive qualifying distributions or roll the distribution back into a Roth IRA within 60 days. You will receive distribution reports from the custodian to assist you with reporting this income.

SIGNATURES

Your signature is required to certify that the information you have provided is true and correct and that you are aware of all the circumstances affecting this IRA withdrawal.

Form **W-4R**

Department of the Treasury
Internal Revenue Service

Withholding Certificate for Nonperiodic Payments and Eligible Rollover Distributions

Give Form W-4R to the payer of your retirement payments.

OMB No. 1545-0074

2026

1a First name and middle initial	Last name	1b Social security number

Address

City or town, state, and ZIP code

Your withholding rate is determined by the type of payment you will receive.

- For nonperiodic payments, the default withholding rate is 10%. You can choose to have a different rate by entering a rate between 0% and 100% on line 2. Generally, you can't choose less than 10% for payments to be delivered outside the United States and its territories.
- For an eligible rollover distribution, the default withholding rate is 20%. You can choose a rate greater than 20% by entering the rate on line 2. You may not choose a rate less than 20%.

See page 2 for more information.

2	Complete this line if you would like a rate of withholding that is different from the default withholding rate. See the instructions on page 2 and the Marginal Rate Tables below for additional information. Enter the rate as a whole number (no decimals)	2	%

Sign Here

Your signature (This form is not valid unless you sign it.) **Date**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about any future developments related to Form W-4R, such as legislation enacted after it was published, go to *www.irs.gov/FormW4R*.

Purpose of form. Complete Form W-4R to have payers withhold the correct amount of federal income tax from your nonperiodic payment or eligible rollover distribution from an employer retirement plan, annuity (including a commercial annuity), or individual retirement arrangement (IRA). See page 2 for the rules and options that are available for each type of payment. Don't use Form W-4R for periodic payments (payments made in installments at regular intervals over a period of more than 1 year) from these plans or arrangements. Instead, use Form W-4P, Withholding Certificate for Periodic Pension or Annuity Payments. For more information on withholding, see Pub. 505, Tax Withholding and Estimated Tax.

Caution: If you have too little tax withheld, you will generally owe tax when you file your tax return and may owe a penalty unless you make timely payments of estimated tax. If too much tax is withheld, you will generally be due a refund when you file your tax return. Your withholding choice (or an election not to have withholding on a nonperiodic payment) will generally apply to any future payment from the same plan or IRA. Submit a new Form W-4R if you want to change your election.

2026 Marginal Rate Tables

You may use these tables to help you select the appropriate withholding rate for this payment or distribution. Add your income from all sources and use the column that matches your filing status to find the corresponding rate of withholding. See page 2 for more information on how to use this table.

Single or Married filing separately		Married filing jointly or Qualifying surviving spouse		Head of household	
Total income over—	**Tax rate for every dollar more**	*Total income over—*	**Tax rate for every dollar more**	*Total income over—*	**Tax rate for every dollar more**
$0	**0%**	$0	**0%**	$0	**0%**
16,100	**10%**	32,200	**10%**	24,150	**10%**
28,500	**12%**	57,000	**12%**	41,850	**12%**
66,500	**22%**	133,000	**22%**	91,600	**22%**
121,800	**24%**	243,600	**24%**	129,850	**24%**
217,875	**32%**	435,750	**32%**	225,900	**32%**
272,325	**35%**	544,650	**35%**	280,350	**35%**
656,700*	**37%**	800,900	**37%**	664,750	**37%**

*If married filing separately, use $400,450 instead for this 37% rate.

General Instructions *(continued)*

Nonperiodic payments—10% withholding. Your payer must withhold at a default 10% rate from the taxable amount of nonperiodic payments **unless** you enter a different rate on line 2. Distributions from an IRA that are payable on demand are treated as nonperiodic payments. Note that the default rate of withholding may not be appropriate for your tax situation. You may choose to have no federal income tax withheld by entering "-0-" on line 2. See the specific instructions below for more information. Generally, you are not permitted to elect to have federal income tax withheld at a rate of less than 10% (including "-0-") on any payments to be delivered outside the United States and its territories.

Note: If you don't give Form W-4R to your payer, you don't provide an SSN, or the IRS notifies the payer that you gave an incorrect SSN, then the payer must withhold 10% of the payment for federal income tax and can't honor requests to have a lower (or no) amount withheld. Generally, for payments that began before 2026, your current withholding election (or your default rate) remains in effect unless you submit a Form W-4R.

Eligible rollover distributions—20% withholding. Distributions you receive from qualified retirement plans (for example, 401(k) plans and section 457(b) plans maintained by a governmental employer) or tax-sheltered annuities that are eligible to be rolled over to an IRA or qualified plan are subject to a 20% default rate of withholding on the taxable amount of the distribution. You can't choose withholding at a rate of less than 20% (including "-0-"). Note that the default rate of withholding may be too low for your tax situation. You may choose to enter a rate higher than 20% on line 2. Don't give Form W-4R to your payer unless you want more than 20% withheld.

Note that the following payments are **not** eligible rollover distributions for purposes of these withholding rules:

- Qualifying "hardship" distributions;
- Distributions required by federal law, such as required minimum distributions;
- Distributions from a pension-linked emergency savings account;
- Eligible distributions to a domestic abuse victim;
- Qualified disaster recovery distributions;
- Qualified birth or adoption distributions;
- Qualified long-term care distributions; and
- Emergency personal expense distributions.

See Pub. 505 for details. See also *Nonperiodic payments—10% withholding* above.

Payments to nonresident aliens and foreign estates. Do not use Form W-4R. See Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities, and Pub. 519, U.S. Tax Guide for Aliens, for more information.

Tax relief for victims of terrorist attacks. If your disability payments for injuries incurred as a direct result of a terrorist attack are not taxable, enter "-0-" on line 2. See Pub. 3920, Tax Relief for Victims of Terrorist Attacks, for more details.

Specific Instructions

Line 1b

For an estate, enter the estate's employer identification number (EIN) in the area reserved for "Social security number."

Line 2

More withholding. If you want more than the default rate withheld from your payment, you may enter a higher rate on line 2.

Less withholding (nonperiodic payments only). If permitted, you may enter a lower rate on line 2 (including "-0-") if you want less than the 10% default rate withheld from your payment. If you have already paid, or plan to pay, your tax on this payment through other withholding or estimated tax payments, you may want to enter "-0-".

Suggestion for determining withholding. Consider using the Marginal Rate Tables on page 1 to help you select the appropriate withholding rate for this payment or distribution. The tables are most accurate if the appropriate amount of tax on all other sources of income, deductions, and credits has been paid through other withholding or estimated tax payments. If the appropriate amount of tax on those sources of income has not been paid through other withholding or estimated tax payments, you can pay that tax through withholding on this payment by entering a rate that is greater than the rate in the Marginal Rate Tables.

The marginal tax rate is the rate of tax on each additional dollar of income you receive above a particular amount of income. You can use the table for your filing status as a guide to find a rate of withholding for amounts above the total income level in the table.

To determine the appropriate rate of withholding from the table, do the following. Step 1: Find the rate that corresponds with your total income not including the payment. Step 2: Add your total income and the taxable amount of the payment and find the corresponding rate.

If these two rates are the same, enter that rate on line 2. (See *Example 1* below.)

If the two rates differ, multiply (a) the amount in the lower rate bracket by the rate for that bracket, and (b) the amount in the higher rate bracket by the rate for that bracket. Add these two numbers; this is the expected tax for this payment. To get the rate to have withheld, divide this amount by the taxable amount of the payment. Round up to the next whole number and enter that rate on line 2. (See *Example 2* below.)

If you prefer a simpler approach (but one that may lead to overwithholding), find the rate that corresponds to your total income including the payment and enter that rate on line 2.

Examples. Assume the following facts for *Examples 1* and *2*. Your filing status is single. You expect the taxable amount of your payment to be $20,000. Appropriate amounts have been withheld for all other sources of income and any deductions or credits.

Example 1. You expect your total income to be $70,000 without the payment. Step 1: Because your total income without the payment, $70,000, is greater than $66,500 but less than $121,800, the corresponding rate is 22%. Step 2: Because your total income with the payment, $90,000, is greater than $66,500 but less than $121,800, the corresponding rate is 22%. Because these two rates are the same, enter "22" on line 2.

Example 2. You expect your total income to be $60,000 without the payment. Step 1: Because your total income without the payment, $60,000, is greater than $28,500 but less than $66,500, the corresponding rate is 12%. Step 2: Because your total income with the payment, $80,000, is greater than $66,500 but less than $121,800, the

corresponding rate is 22%. The two rates differ. $6,500 of the $20,000 payment is in the lower bracket ($66,500 less your total income of $60,000 without the payment), and $13,500 is in the higher bracket ($20,000 less the $6,500 that is in the lower bracket). Multiply $6,500 by 12% to get $780. Multiply $13,500 by 22% to get $2,970. The sum of these two amounts is $3,750. This is the estimated tax on your payment. This amount corresponds to 19% of the $20,000 payment ($3,750 divided by $20,000). Enter "19" on line 2.

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to carry out the Internal Revenue laws of the United States. You are required to provide this information only if you want to (a) request additional federal income tax withholding from your nonperiodic payment(s) or eligible rollover distribution(s); (b) choose not to have federal income tax withheld from your nonperiodic payment(s), when permitted; or (c) change a previous Form W-4R (or a previous Form W-4P that you completed with respect to your nonperiodic payments or eligible rollover distributions). To do any of the aforementioned, you are required by sections 3405(e) and 6109 and their regulations to provide the information requested on this form. Failure to provide this information may result in inaccurate withholding on your payment(s). Failure to provide a properly completed form will result in your payment(s) being subject to the default rate; providing fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.