

The Account Information screen appears. Perform the following:

The screenshot shows a software window titled "IRA Portfolio Management" with a sub-header "Time Deposit IRA Information". The user name "LARRY C KEATH" is displayed on the left. On the right, "IRA Account Services" and "Time Deposit" are listed, with the account number "40016253" below them. The "IRA Account Information" section includes a "Plan" dropdown set to "Regular" and a "Maximum Annual Contribution" field set to "\$3,500.00". The "Participation Status" is "Contribution" and the "Designated Beneficiary Account" is "No". The "Default Distribution Reason" dropdown is open, showing a list of options: "Normal Distribution", "Transfer Distribution", "Prior Year Excess Contribution Withdrawal", "Prior Year Recharacterized Distribution", "Withdrawal Due to Disability", "Recharacterized Distribution", "SIMPLE Early Distribution First 2 Years", and "Deceased Closeout Withdrawal". A mouse cursor is pointing at "Deceased Closeout Withdrawal". Below this, the "Source of Contribution" field is empty, and the "Effective Date of Contribution" is shown as "/ /" with a calendar icon. The "Contribution Amount" field is set to "\$0.00". The "Initial Contribution Fee" is also "\$0.00". At the bottom left, there is a checkbox for "Transfer/Rollover from Another Institution" which is unchecked. At the bottom right, there are "Previous", "OK", and "Cancel" buttons.

- Use the **Default Distribution Reason** drop-down menu to select *Deceased Closeout Withdrawal* to be tagged to the transaction for tax reporting reasons.