How to: Request a Distribution

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Request a Distribution

If you are needing to take a distribution or withdrawal from one of your investment accounts, please follow the process below.

Step 1

Send an email to clientsuccess@financialgravity.com with the information listed below.

1. Financial Institution (ex. Schwab)
2. Account Number
3. Date Requested
4. Frequency (once, monthly, etc.)
5. Federal taxes withheld (minimum is 10%)
6. State taxes withheld (if applicable)
7. Funding Source (ACH, Check, Wire) - for ACH requests, please include the last 4 of the bank account number

Step 2

Our back office team will create a service ticket for your request to be put in the queue. You will receive an email response from the team letting you know that we have received your request.

Step 3

Once we begin working on your request, you will receive an email notifying you that we have begun processing.

Step 4

When your request is complete, you will receive another email letting you know this is complete.

If you have any questions, please reach out to us at clientsuccess@financialgravity.com or by calling 800-588-3893, opt. 2.

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