How to: Request a Distribution

Version: 1.00 | Updated: 09/18/2026 8:58 am CDT | Published: 06/12/2025

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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. Last four digits of Account Number
3. Date to process request
4. Frequency: Select one of the options below.
    a. One-time
    b. 2 Times/Month - both days of the month to process are required
    c. Monthly
    d. Last business day of the month
    e. Quarterly
    f. Semi-Annually - both dates to process on are required
    g. Annually
    h. Weekly: Select one day between Monday and Friday
5. Federal taxes withheld (can be 0% or a minimum of 10%)
6. State taxes withheld (if applicable) - If selected, this withholding percentage must meet your resident state's requirements.
7. Funding Source (ACH, Check, Wire) - for ACH requests, please include the last 4 of the bank account number

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Step 2

Our processing 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

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Services, LLC. (FG Family Office Services), an SEC Registered Investment Adviser. Neither FG Asset Management nor FG Family Office Services provides tax or legal advice and is not a certified public accountant.

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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