Rollover Form

Plan Name:
Case Number:

STEP ONE: FILL IN YOUR PERSONAL INFORMATION

First name

Last name

- -
Social Security Number

STEP TWO: ROLLOVER INSTRUCTIONS

You can transfer funds into your retirement plan from your previous employer's retirement plan or from existing pre-tax Individual Retirement Accounts (IRAs).

To transfer funds you must:

1. Contact previous employer or IRA custodian to obtain distribution paperwork
2. Elect "direct rollover" as your distribution option (after considering all options and tax consequences)
3. Check must be made payable to "«PlanName»"
4. Forward check with this completed form to your Employer

STEP THREE: SIGN AND DATE

By signing below, I hereby certify that this is qualified to be deposited into the Plan. I certify that this rollover contains no after-tax contributions.

Furthermore, I understand that the assets being rolled over from my previous provider will be invested into my account according to my investment allocation on the date of deposit.

Employee Signature: Date:

RETURN COMPLETED FORM TO YOUR HUMAN RESOURCES REPRESENTATIVE