



ROLLOVER FORM

Name: _____ Current Employer: _____

Social Security Number: _____ Date of Birth: _____ Date of Hire: _____

Address: _____ City: _____ ST: _____ ZIP: _____

Daytime Phone: _____ Email: _____

Financial Institution and /or Former Employer: _____

Contact Name: _____ Phone: _____

Address: _____ City: _____ ST: _____ ZIP: _____

Approximate Rollover Balance: _____

Type of Plan:

☐ 401(k) ☐ Profit Sharing ☐ Money Purchase ☐ 403(b) ☐ Traditional IRA ☐ Rollover IRA

☐ Other _____

☐ Please attach your Financial Institution and/or Former Employer Distribution Form for this rollover.

My signature below confirms that the information provided is accurate, my understanding of the preceding acknowledgements and that I am responsible for any tax consequences or penalties which may apply as a result of these transactions.

Participant Signature _____ Date _____

Current Plan Trustee Signature _____ Date _____