



Reform Pension Board

**USE THIS FORM ONLY WHEN THE TRANSFER IS DIRECTLY FROM YOUR
TRADITIONAL IRA**

**Reform Pension Board
Request to Roll over Funds from an IRA**

INSTRUCTIONS TO PARTICIPANT: Please complete this form. A check payable to "REFORM PENSION BOARD" MUST BE ATTACHED TO THIS FORM as indicated below.

Mail the form and check to:

Reform Pension Board
355 Lexington Avenue, 18th Floor
New York, NY 10017

Participant Name: _____

Social Security Number: _____

Address: _____

Daytime Phone: _____

Please be advised that I wish to roll over money from my traditional IRA to the Reform Pension Board Pension Plan ("RPB Plan"). I understand that rollovers cannot include after-tax contributions and non-deductible contributions made to my IRA and that money in ROTH IRAs cannot be rolled over to the RPB pension plan. I understand that these funds, once deposited in the RPB Plan, will be subject to all provisions of the RPB Plan and the Internal Revenue Code including the minimum distribution rules of Internal Revenue Code Section 401(a)(9), (requiring that distributions begin no later than April 1 of the calendar year following the later of (A) the calendar year in which I attain the age of 70½ or (B) the calendar year in which I retire). Further, I acknowledge that these funds will not be subject to withdrawal from the RPB Plan until separation from service, retirement, death or disability, in accordance with RPB Plan rules and Internal Revenue Code Section 403(b)(11).

Transfer:

Attached is a check in the amount of \$_____ from my IRA made payable to "Reform Pension Board." This represents my distribution from my IRA.

Certification (check all that apply):

I certify that the money I am rolling over from my IRA to the RPB represents prior ordinary IRA contributions.

I certify that the money I am rolling over from my IRA to the RPB represents distributions that were rolled over to my IRA from a qualified retirement plan (includes Internal Revenue Code Section 401(a), 401(k), 403(b) and 457 plans). I also certify that I was entitled to the distribution from the qualified retirement plan as an employee and not as a beneficiary, the distribution was not one of a series of periodic payments, the contribution to the IRA was made not more than sixty (60) days after the date I received the distribution from the qualified retirement plan and the entire amount of the rollover contribution would be includible in gross income if it were not being rolled over.



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Documentation:

All rollovers must be accompanied by a distribution or other statement from your IRA indicating the account is identified as an IRA and the date the IRA made the distribution.

Signature of Participant

Date