



Reform Pension Board

USE THIS FORM ONLY WHEN THE TRANSFER IS DIRECTLY FROM YOUR PRIOR PLAN

**Reform Pension Board
Request to Roll over Funds from Prior Plan Distribution**

INSTRUCTIONS TO PARTICIPANT: Please complete this form. A check payable to "REFORM PENSION BOARD" MUST BE ATTACHED TO THIS FORM, along with other required documents, 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: _____

As a former participant in a tax qualified retirement program titled _____ ("prior plan") and sponsored by _____, please be advised that I wish to roll over my distribution from such prior plan to the Reform Pension Board Pension Plan ("RPB Plan"). (Distributions from eligible tax qualified retirement programs include Internal Revenue Code Section 401(a), 401(k), 403(b) and 457 plans.)

This money represents employer contributions or salary deferral contributions only. **No part of this Rollover Account is attributable to employee after-tax contributions.** 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 the prior plan's trustee made payable to "Reform Pension Board." This represents my distribution from my prior plan.

Documentation:

I have also attached a letter from the plan administrator from my prior plan stating that the plan has received a favorable determination letter from the Internal Revenue Service or a letter from the plan administrator stating that the plan complies with the Internal Revenue Code, as amended, and the Employee Retirement Income Security Act of 1974, as amended.

Signature of Participant

Date