

# ROLLOVER FORM

\_\_\_\_\_ allows employees and plan participants to rollover existing qualified  
(Plan Name)  
money into the retirement plan. If someone wishes to roll money into the plan, please follow the instructions below:

1. Obtain withdrawal forms from the previous retirement plan sponsor or provider.

2. Instruct them to issue a check payable to:

Name of Asset Custodian: \_\_\_\_\_

fbo: \_\_\_\_\_

(Participant's Name)

Account #: \_\_\_\_\_

**Or**

Trustees of: \_\_\_\_\_

(Plan Name)

fbo: \_\_\_\_\_

(Participant's Name)

Account #: \_\_\_\_\_

3. When the check is received, it should be given to the Plan Trustee.

If the check is made payable to Trustees of the plan, the Trustee must sign the check, as Trustee, Payable to Asset Custodian and forward the check and this completed form to ThePensionSpecialists, Ltd.

**Or**

If the check is payable to the Asset Custodian, the Trustee will forward the check and this completed form to ThePensionSpecialists, Ltd.

4. Mail the check and this completed form to **ThePensionSpecialists, Ltd.**, P.O. Box 4247, Rockford, IL 61110-0747.

~~~~~ This form must be signed and returned with the rollover check. ~~~~~

As Trustee of the \_\_\_\_\_, I certify that the pre-tax assets being transferred into  
(Plan Name)  
our Plan are tax qualified. This rollover should be credited to the account of:

\_\_\_\_\_  
Participant's Name

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Trustee Signature

\_\_\_\_\_  
Date

Contact our Customer Service Representative at (815) 394-5500 or 1-800-963-5501 extension 103 with your questions.