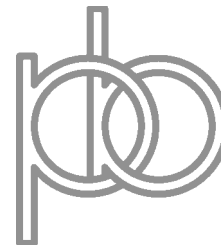


Pension Boards
United Church of Christ

475 Riverside Drive
 Room 1020
 New York, NY 10115-0059

p 800.642.6543
 f 212.729.2701

www.pbucc.org
 info@pbucc.org



Request for Direct Rollover of Funds

MEMBER:

Please complete sections A, B and C and forward this form to the financial institution transferring the funds.

FINANCIAL INSTITUTION:

Please complete section D and return this form, with a check for the proceeds, per the instructions listed under D-3 on the reverse side.

SECTION A: Personal Information		
Social Security number	Name (last, first, middle initial)	Date of birth (month/day/year) / /
Address (number and street)		City/State/ZIP
Telephone number (with area code) () -		E-mail address @
SECTION B: Information Regarding the Funds to Be Rolled Over		
1. Financial Institution or Retirement Plan from which funds will be transferred		
Name:		
Address (number and street)		City/State/ZIP
2. Annuity contract, account number, or other identifying number from which funds will be transferred		
3. Source of Funds: Please complete the blank with either a dollar amount or percent		
\$ _____ OR _____ % of the funds remitted herewith represent funds arising from ministerial employment.		
\$ _____ OR _____ % of the funds remitted herewith represent funds arising from non-ministerial employment.		
SECTION C: Member Authorization		
<i>I hereby direct the financial institution identified in Section B to transfer funds from my account (referenced in Section B, above) to my Retirement Savings Account administered within The Annuity Fund–United Church of Christ. I authorize the liquidation of all positions in respect of my account (referenced in Section B, above) in order to execute the transfer of funds. I understand that these funds will be placed in my Retirement Savings Account within the Annuity Fund and will be allocated in accordance with my instructions.</i>		
Member's signature		Date

**SECTION D: Certification of Financial Institution from Which Rollover Is to Be Made
("Transfer Financial Institution")**

The Transfer Financial Institution agrees and represents to The Pension Boards–United Church of Christ and the Member that:

1. *The existing retirement account* from which the direct rollover is made is a*
 - 401(a) qualified plan, including 401(k)
 - 403(a) qualified plan
 - 403(b)(1) annuity contract
 - 403(b)(7) custodial account
 - 403(b)(9) church retirement income account
 - traditional Individual Retirement Account or Annuity (IRA)
 - 457 governmental plan

2. *The member is one hundred percent (100%) vested in all amounts being transferred to The Annuity Fund–United Church of Christ.*

3. *The Transfer Financial Institution agrees to transmit funds to The Pension Boards–United Church of Christ, 475 Riverside Drive, Suite 1020, New York, NY 10115-0049. The check shall be payable to "The Pension Boards–United Church of Christ, F.B.O., the Member. Please indicate "Direct Rollover" on the check.*

** No after-tax contributions*

Transfer Financial Institution

Authorized signature

Date

Please print name

Please return this completed, signed and dated form to:

Pension Boards–United Church of Christ
 475 Riverside Drive
 Suite 1020
 New York, NY 10115-0059
 p 800.642.6543
 f 212.729.2741

SECTION E: Acceptance

The Pension Boards–United Church of Christ will accept a direct rollover of the amount described in Section D and will deposit it in a 403(b)(9) retirement income account for the participant listed in Section A.

FOR OFFICE USE ONLY

Approved by

Jean M. Roguski
 Director, Member Services

Date