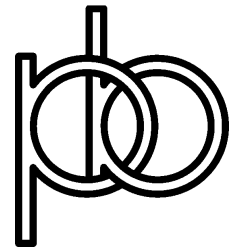


The Pension Boards
United Church of Christ

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

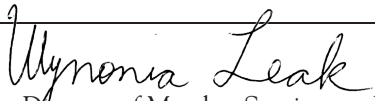
p 800.642.6543
f 212.729.2701

www.pbucc.org
info@pbucc.org



Request for Direct Rollover of
Funds to the Pension Boards

Please send this completed and signed form to the financial institution from which you are rolling over funds.				
Social Security Number	<input type="checkbox"/> Mr. <input type="checkbox"/> Ms.	Name (last, first, middle initial)		
Address 1	City	State	Zip	County
Address 2				
Address 3	E-mail Address			
Telephone Number ()				
SECTION A: Information Regarding the Financial Institution from Which the Funds Are to Be Rolled Over				
Name of Financial Institution		Annuity Contract or Account number		
Address		City	State	Zip
\$ _____ 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 B: Member Authorization				
I hereby direct the financial institution identified in Section A to transfer funds from my account (referenced in Section A, above) to my Rollover Contribution Account (for non-annuitized members) or my Retirement Savings Account (for member's receiving a monthly annuity benefit) administered within The Annuity Plan for the United Church of Christ ("the Annuity Plan"). I authorize the liquidation of all positions in respect of my account (referenced in Section A, above) in order to execute the transfer of funds. I understand that these funds will be placed in my Rollover Contribution Account or my Retirement Savings Account within the Annuity Plan and will be allocated in accordance with my instructions.				
Member Signature		Date		
SECTION C: Certification of Transfer Financial Institution from Which Rollover Is to Be Made				
The Transfer Financial Institution agrees and represents to The Pension Boards-United Church of Christ, Inc. and the Member that:				
<ol style="list-style-type: none"> 1. The existing retirement account* from which the direct rollover is made is a: <ul style="list-style-type: none"> <li style="width: 50%;">• 401(a) qualified plan, including 401 (k) <li style="width: 50%;">• 403(b) (9) church retirement income account <li style="width: 50%;">• 403(a) annuity plan <li style="width: 50%;">• Traditional Individual Retirement Account or Annuity (IRA) <li style="width: 50%;">• 403(b)(1) annuity contract <li style="width: 50%;">• 475 governmental plan <li style="width: 50%;">• 4039b)(7) custodial account 2. The member is one hundred percent (100%) vested in all amounts being transferred to the Annuity Plan. 3. The Transfer Financial Institution agrees to transmit the funds to The Pension Boards-United Church of Christ, Inc., 75 Remittance Drive, Suite 1592, Chicago, IL 60675-1592. The check shall be payable to "The Pension Boards-United Church of Christ, Inc.," F.B.O., the Member. Please indicate "Direct Rollover" on the check. 				
*No after-tax contributions				

Transfer Financial Institution	Authorized Signature
Date	Print Name
SECTION D: Acceptance	
The Pension Boards-United Church of Christ, Inc. will accept a direct rollover of the amount described in Section C and will deposit it in a 403(b)(9) retirement income account for the member listed.	
FOR OFFICE USE ONLY	
 Approved by Director of Member Services and Member Education	Date 11/21/2016