



# Request for Direct Rollover of Funds to the Pension Boards

MEMBER ID: \_\_\_\_\_

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## PERSONAL INFORMATION

SSN: \_\_\_\_\_ Title: [ ] Rev. [ ] Dr.

Name of Member (last, first, middle initial): \_\_\_\_\_

Cell Phone: (\_\_\_\_) \_\_\_\_ - \_\_\_\_ Home Phone: (\_\_\_\_) \_\_\_\_ - \_\_\_\_ Email: \_\_\_\_\_

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## FINANCIAL INSTITUTION INFORMATION

Name of financial institution: \_\_\_\_\_

Annuity contract or account number: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

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## FUNDS TO BE ROLLED OVER

\$ \_\_\_\_\_ or \_\_\_\_\_ % represents funds arising from Clergy employment.

\$ \_\_\_\_\_ or \_\_\_\_\_ % represents funds arising from non-Clergy employment.

I hereby direct the above listed financial institution to transfer funds from my account held with them 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 above) 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.

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**ACKNOWLEDGEMENT OF THE DIRECT ROLLOVER**

I acknowledge to The Pension Boards–United Church of Christ, Inc., that:

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

*\*No after-tax contributions*

2. I am one hundred percent (100%) vested in all amounts being transferred to the Annuity Plan.
3. I will transfer remittance of the check payment 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., "Member Name." Please indicate the type of retirement account on the check.
4. Enclosed is a copy of the last available statement for the account from which the rollover is being made.

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**SIGNATURE**

Member Signature \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

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Please return this signed and completed form by email to: [info@pbucc.org](mailto:info@pbucc.org); by fax: 212.729.2701; or mail to: Pension Boards-UCC, 475 Riverside Drive, Suite 1020, New York, NY 10115.

All correspondence that have check payments included, must be mailed to Lockbox address The Pension Boards-United Church of Christ, Inc., 75 Remittance Drive, Suite 1592, Chicago, IL 60675-1592.