

**Request for Direct Rollover of  
Funds to the Pension Boards**

PERSONAL INFORMATION			
Social Security Number	Member ID	Title <input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Rev. <input type="checkbox"/> Dr.	Name of participant ( <i>last, first, middle initial</i> )
Telephone number ( <i>with area code</i> ) (       )       -		E-mail address  @	
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 ( <i>number and street</i> )		City/State/ZIP	
\$ _____ OR _____ % of the funds remitted herewith represents funds arising from ministerial employment.			
\$ _____ OR _____ % of the funds remitted herewith represents funds arising from non-ministerial employment.			
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) 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.			
SECTION B: 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 a:			
<ul style="list-style-type: none"> <li style="display: inline-block; width: 45%;">• 401(a) qualified plan, including 401(k)</li> <li style="display: inline-block; width: 45%;">• 403(b) (9) church retirement income account</li> <li style="display: inline-block; width: 45%;">• 403(a) annuity plan</li> <li style="display: inline-block; width: 45%;">• Traditional Individual Retirement Account or Annuity (IRA)</li> <li style="display: inline-block; width: 45%;">• 403(b)(1) annuity contract</li> <li style="display: inline-block; width: 45%;">• 457 governmental plan</li> <li style="display: inline-block; width: 45%;">• 403(b)(7) custodial account</li> </ul>			
2. I am one hundred percent (100%) vested in all amounts being transferred to the Annuity Plan.			
3. 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., "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.			
*No after-tax contributions			
Member Signature		Date  / /20	

**Please return to the Pension Boards at the address indicated below, and retain a copy for your records.**