

# 403(b) Direct Rollover Request

You must be eligible to receive a distribution from the distributing plan and be an eligible participant in CEP's 403(b) Plan before you can request a direct rollover. Some companies may require you to complete their forms. Contact the sending custodian for additional requirements.

## PARTICIPANT INFORMATION

Full Name	Date of Birth	Account Number	
Daytime Phone	Social Security Number		
Mailing Address	City	State	ZIP
Email			

## SENDING CUSTODIAN INFORMATION

Sending Custodian Name	Phone		
Sending Custodian Address	City	State	ZIP

## SENDING ACCOUNT TYPE\* AND AMOUNT (Attach your most recent statement for the account you are moving. \*Designated Roth contributions not accepted.)

Traditional IRA     SEP IRA     401(k)     Another 403(b) Plan     Governmental 457(b) Qualified Plan     Other Qualified Plan

Account number assets are coming from: \_\_\_\_\_

Amount to Send:     Full Liquidation     Partial Amount \$ \_\_\_\_\_

Timeframe:     Immediately     At Maturity – Maturity Date: \_\_\_\_\_

## PARTICIPANT AUTHORIZATION

I authorize this direct rollover of retirement plan assets and certify all information provided by me is correct and can be relied upon by the receiving and sending Custodian/Trustee. I understand it is my responsibility to determine that I am eligible to rollover these assets within the tax law limits, regulations, and plan agreements. I understand there may be penalties or tax consequences that apply to this rollover of assets. I agree to hold Church Extension Plan, the Plan Administrator and Trustee, harmless for any action or omitted action based on directions or information I provide them.

Participant Signature \_\_\_\_\_ Date \_\_\_\_\_

## SUBMITTING YOUR FORM

To submit your completed form, send a scanned PDF (or similar format) to [investment@cepnet.com](mailto:investment@cepnet.com) or mail/fax the document(s) to the address/fax number below.

## RECEIVING CUSTODIAN ACCEPTANCE

Church Extension Plan agrees to accept the rollover of assets as directed above. The receiving Plan is a 403(b) retirement account. This direct rollover is to be executed as a trustee-to-trustee rollover and will not place the participant in actual receipt of any of the plan assets. (Acceptance Letter attached.)

Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_

