



Slavic Integrated Administration
 1075 Broken Sound Parkway NW, Suite 100
 Boca Raton, FL 33487-3540
 Phone: 800-356-3009
 Fax: 561-241-1070
 Email: Rollovers@slavic401k.com

Rollover Form

Rolling funds into Slavic & PlanRight 401(k) Plan

IMPORTANT INFORMATION REGARDING ROLLOVERS INTO YOUR PLAN

Rollover Instructions:

- To initiate a rollover distribution from a traditional IRA or a qualified employer plan, please contact your previous investment provider or 401k administrator. They will require that you follow their distribution process and complete the required distribution/transfer request form.
- Please provide the following information to your previous plan investment provider:
 - The direct rollover check should be made payable to: **Depository Services, Inc.**
 - The check should be for the benefit of you (FBO: Your Name should be printed on the check).
 - If possible, the name of your current employer should be listed in the Memo section of the check.
 - Your previous plan investment provider may mail the check to you or they may mail it directly to us. If the check is mailed to your home address, simply forward the check to us.
 - The rollover check should be mailed to:
Slavic Integrated Administration
Attn: Gita Rahmani
1075 Broken Sound Parkway NW, Suite 100
Boca Raton, FL 33487-3540

Indirect (60 day) rollover instructions:

- If you have already received a distribution payable to yourself, you may still be able to initiate a 60 day indirect rollover (*Contact us to find out if you qualify*).
- Please send a check payable to Depository Services, Inc. for the amount you wish to rollover. You may send a check for the amount you received (net of taxes withheld) or you may send a check for the full amount of the distribution (net check amount + taxes withheld).
- The transfer must be completed within 60 days of the issuance of the check by your previous plan investment provider. *For example:* if your check was issued on March 1st by your previous plan administrator/custodian, the transfer into your new plan must be completed by April 30th.
- You will need to include your distribution statement and a copy of the original check from your previous plan investment provider with the check.
- We reserve the right to require sufficient evidence that your distribution is from an eligible retirement plan or IRA.

Roth IRA – Funds from a Roth IRA are not eligible to be rolled over into a qualified 401(k) plan.

Section 1: Type of Account or Contract to move:

Please indicate the investment vehicle in which the rollover funds originated from:

- | | |
|---|--|
| <input type="checkbox"/> Qualified 401(k) Plan (pre-tax contributions only) | <input type="checkbox"/> Simple 401(k) Plan |
| <input type="checkbox"/> Qualified 401(k) Plan with Roth contributions . if your rollover funds include Roth contributions the following information should be included with the check: tax year of first Roth contribution and total Roth basis | <input type="checkbox"/> IRC 403(b) Plan |
| <input type="checkbox"/> Traditional IRA | <input type="checkbox"/> Governmental 457 Plan |
| | <input type="checkbox"/> Other: _____ |

Section 2: Participant Information

Participant Name _____ Social Security Number _____

Participant Address _____

_____ City State Zip

Daytime Telephone (____) _____ Fax Number (____) _____ Date of Hire _____

E-mail _____ Worksite Employer _____

Please return this form with Rollover check to:
Slavic Integrated Administration
Attn: Gita Rahmani
1075 Broken Sound Parkway NW, Suite 100
Boca Raton, FL 33487-3540

Participant Signature (required)

Date

Print Name