



**ROLLOVER CONTRIBUTION REQUEST**

To the Trustee of the City of Seattle Retirement Plan (A qualified plan under Internal Revenue Code section 401(a).)

**PART I — TO BE COMPLETED BY THE PARTICIPANT**

Name (Please Print) \_\_\_\_\_

Address \_\_\_\_\_

Social Security Number \_\_\_\_\_

As a Participant in the above plan, I hereby make a "rollover contribution" in the cash amount of:

\$ \_\_\_\_\_

The rollover contribution is eligible for rollover and is from a source that satisfies the requirements of the following section of the Internal Revenue Code of 1986, as amended:

- §403(a)
- §403(b)
- §457 Governmental Plan
- §408(a) IRA – Traditional
- §401(a) defined benefit plans
- §401(a) defined contribution plans

If the rollover contribution is from an IRA, I certify the above amount does not include any amounts that have previously been taxed.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_

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

**PART II — TO BE COMPLETED BY THE PARTICIPANT'S FORMER PLAN OR IRA**

As Custodian/Trustee of the above-named Participant's IRA or Plan Administrator of the above-named Participant's Eligible Employer Plan, please provide the following information and sign the form below:

Plan or IRA Name: \_\_\_\_\_

Gross amount of distribution: \$ \_\_\_\_\_ Taxable amount of the distribution: \$ \_\_\_\_\_

Non-taxable amount of the distribution: \$ \_\_\_\_\_

If the distribution is from an employer plan, does it qualify as an "eligible rollover distribution" under Section 402(c) of the Internal Revenue Code? \_\_\_\_\_

I certify that the above-named plan or IRA is intended to satisfy the requirements of the Internal Revenue Code for the plan type checked by the Participant above, and I am not aware of any plan or IRA provision or operation that would result in its disqualification.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_

\_\_\_\_\_  
Name of Custodian / Trustee or Plan Administrator

\_\_\_\_\_  
Signature of Custodian / Trustee or Plan Administrator

**Only Direct Rollovers To The Plan Are Permitted.**

**Rollover Checks MUST Be Made Payable To: Seattle City Employees' Retirement System.**

**This completed form MUST be returned or we cannot accept the transfer.**