

REQUEST FOR ROLLOVER CONTRIBUTION

To the Trustees of the _____ (Plan Name)

Re: _____
(name)

(address)

(city, state & ZIP Code)

(Social Security)

Dear Trustees::

As a Participant in the Trust referenced above, I hereby request your approval to deposit a cash "rollover contribution" in the amount of \$ _____. The rollover contribution satisfies the requirements of the following section of the Internal Revenue Code of 1986, as amended by the Economic Growth and Tax Relief Act of 2001. Funds are coming from one of the following types of accounts:

- _____ §402 (a)(5) (qualified plan)
- _____ §408 (d)(3) (IRA containing only pre-tax contributions)
- _____ §403 (a)(4) (individual annuity)
- _____ §402 (c)(8) (403(b) tax-sheltered annuity plan)

Dated this _____ day of _____, _____.

Participant signature

A statement of your account prepared by the distributing plan is required to accompany this statement so that we can verify that the rollover is eligible plan. If such a statement is not available, please have your tax adviser complete the following statement:

As tax adviser to the Participant named above, I hereby confirm the applicability of the designated Code section to the contribution described in this rollover contribution statement.

Dated this _____ day of _____, 20____.

Tax Adviser

Accepted by:

Plan Official

Footnotes:

An "eligible plan" includes a plan qualified under section 401(a) of the Internal Revenue Code, including a 401(k) plan, profit sharing plan, defined benefit plan, stock bonus plan, and money purchase plan; a section 403(b) annuity plan; a section 403(b) tax-sheltered annuity; and an eligible section 457(b) annuity plan maintained by a governmental employer (governmental 457 plan).