



Direct Transfer for Purchase of Permissive Service Credits

Personal Information

Name: _____ Account Number or SSN: _____

Home Phone: _____ Work Phone: _____

Email: _____

How would you like to be contacted if additional information is required? Telephone Email

Plan Transfer From

- City of Chicago Deferred Compensation Plan (0035044001)
- City of Chicago 401(a) Match Plan (0035044003)
- Cook County Forest Preserve Deferred Comp. Plan (0035043001)
- Cook County Employees Deferred Compensation Plan (0035046001)

Distribution Source*

- All Sources Proportionally
- Salary Reduction
- Roth Contribution
- Roth Rollover
- Rollover Pre-Tax
- Rollover 457(b)
- Employer Match (401(a) Only)

*If a source is not selected, your funds will be disbursed from all sources proportionally.

NOTE: Roth Contribution and Roth Rollover sources may only be used if the dollars are eligible for a "qualified distribution". A qualified distribution cannot be made within five years of the first designated Roth contribution to this plan (or to the plan the Roth Rollover originated from), and must be made on or after the attainment of age 59 1/2 or the participant's disability.

Pension Fund Verification

Please consider this as confirmation of the balance due of \$ _____ if paid by _____. Payments made and balances due after this date may accrue additional interest.

Pension Board Authorized Signature: _____ Date _____

(The individual signing this request must be an authorized signer of the appropriate pension board and acknowledges that the pension board, as checked below, will accept this request for the benefit of the participant from a Section 457 Deferred Compensation Plan.) Or you may attach a letter from the Pension Board indicating the amount of eligibility.

- County Employees' and Officers' Annuity and Benefit Fund of Cook County**
70 W. Madison St., Suite 1925, Chicago, IL 60602
Phone: 312-603-1200
- Firemen's Annuity and Benefit Fund of Chicago¹**
20 S. Clark St., Suite 300, Chicago, IL 60603
Phone: 312-726-5823 *****FUND ACCEPTS PRE-TAX ONLY*****
- Forest Preserve District Employees' Annuity and Benefit Fund of Cook County**
70 W. Madison St., Suite 1925, Chicago, IL 60602
Phone: 312-603-1200
- Illinois Municipal Retirement Fund**
2211 York Road, Suite 500, Oak Brook, IL 60523-2337
Phone: 800-275-4673
- Laborers' and Retirement Board Employees' Annuity and Benefit Fund of Chicago**
321 N. Clark Street, Suite 1300, Chicago, IL 60654
Phone: 312-236-2065
- Municipal Employees' Annuity and Benefit Fund of Chicago¹**
321 N. Clark Street, Suite 700, Chicago, IL 60654
Phone: 312-236-4700
- Policemen's Annuity and Benefit Fund of Chicago**
221 N. LaSalle St., Suite 1626, Chicago, IL 60601
Phone: 312-744-3891
- State Retirement Systems**
2101 South Veterans Pky, PO Box 19255
Springfield, IL 62794
Phone: 217-785-7444
- State Universities Retirement Systems**
1901 Fox Drive, Champaign, IL 61820
Phone: 800-ASK-SURS (800-275-7877)

¹If this option is selected, payment will be sent via ACH.

Participant understands that to effect this transfer, investment options will be liquidated in the order established by the plan sponsor. **Transfer requests must be authorized by the appropriate pension board and received by Nationwide Retirement Solutions by the 15th of the month to be processed by the end of the month.** The Plan Sponsor and its Third-Party Administrator assumes no responsibility for any investment losses the participant may experience as a result of this transfer or attempt to transfer. By making said transfer on behalf of participant, Plan Sponsor and its Third-Party Administrator make no warranties or representations as to whether any such transfer will be construed as a taxable event or whether receiving plan may lawfully accept such transfers.

Signature: _____ Date: _____