



457(b) Transfer Authorization Form

Participant Instructions

The 457(b) Transfer Authorization Form must be submitted to National Benefit Services, LLC (NBS), the third party administrator, to authorize any transfer of 457(b) amounts between transfer-eligible investment providers of your employer's 457(b) plan. The surrendering investment provider will require its own paperwork in addition to this form. You may wish to attach your investment provider's paperwork to this form. All attached forms or paperwork will be forwarded to the surrendering investment provider indicated (unless specified otherwise in steps 2 and 3). Complete steps 1-4 and mail or fax this form to NBS. Inquiries regarding the status of your transaction may be directed to NBS at (800) 274-0503 ext. 5. After paperwork has been forwarded to your investment provider, inquiries should be directed to your provider. After this form has been received by NBS in good order, it will be forwarded to your provider within 5 business days. Submission of this form does not affect any existing salary reduction arrangements you currently maintain with your employer. If you wish to discontinue or direct future contributions to a new vendor you must complete a corresponding new salary reduction agreement (SRA). A list of exchange-eligible investment providers and SRA form are available at www.nbsbenefits.com/403b.

Vendor Instructions

NBS represents that this transfer of 457(b) amounts is permitted by the employer's plan. The surrendering investment should provide to the receiving provider at the time of the transfer information regarding the portion of the transferred amount represented by deferral amounts. NBS reserves the right to not sign surrendering or receiving vendor paperwork according to the ISA (if applicable).

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1 Participant Information

Participant Name		Employer Name	
Participant Mailing Address City, State, Zip Code		Employer State	
Home Phone Number	Work Phone Number	Date of Birth	Social Security Number
Financial Advisor/Agent Name		Financial Advisor/Agent Phone Number	

2 Surrendering Investment Provider Information

Investment provider from which 457(b) amounts will be transferred or surrendered (source of assets)

Investment Provider	Account Number	Phone Number
Mailing Address City, State, Zip Code		Fax Number

3 Receiving Investment Provider Information

Investment provider that will receive the exchange of 457(b) amounts (destination of assets)

Investment Provider	Account Number	Phone Number
Mailing Address City, State, Zip Code		Fax Number

Is this transfer intended to purchase service credits as part of your employer's defined benefit plan? No Yes

4 Recipient of this form

Please indicate the provider (Surrendering or Receiving) to which NBS should send this paperwork. Generally, the Surrendering provider should receive this form but the Receiving provider may instruct you otherwise. If no option is selected, NBS will forward this form and all accompanying paperwork to the Surrendering provider.

- Surrendering Provider (Provider from which assets will be transferred)
- Receiving Provider (Provider that will be receiving the assets)

5 Participant Approval

I certify that all information provided on this form is accurate and correct. I recognize that the information contained on and attached to this form may be shared with a third party (including National Benefit Services, LLC (NBS)) as necessary to administer the Plan in accordance with the Internal Revenue Code. I authorize the release of non-public information pertaining to the above accounts and transaction to NBS representatives as necessary to administer the plan. I certify that the information I have provided is accurate. (Consult with a tax advisor for tax-related questions.)

Participant Signature (Required)	Date
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6 For NBS Use Only

NBS Signature (Required)	Date
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