

DEFINITIONS AND USAGE OF FORMS

Employer Sponsored Retirement Plan Forms

Participant Name Change Form for Retirement Plan Accounts

Change the participant name on an existing SEP, SAR-SEP, Keogh or 403(b)(7) account because of a legal name change.

403(b)(7) Beneficiary Designation Form

Establish or change the primary and secondary beneficiary(ies) for your 403(b)(7) account.

403(b)(7) Account Transfer Request Form

Transfer or directly roll over all or a portion of your 403(b) Plan, IRA or qualified plan to your 403(b)(7) account.

403(b)(7) Distribution/Transfer Request Form

Make distributions or transfers from your 403(b)(7) account.

403(b)(7) Account Salary Reduction Agreement

To change the amount of money coming out of your paycheck, return this completed form to your employer.

Keogh Distribution Request Form

Use this form if you are a Keogh plan participant, or a beneficiary of the deceased participant, to request a distribution from the Keogh Plan. To avoid processing delays, call to confirm the status of your Adoption Agreement.

Keogh Required Minimum Distribution Request Form

Make distributions from your Keogh Plan.

Keogh Plan Beneficiary Designation Form

Establish or change the primary and secondary beneficiary(ies) for your Keogh Plan.

Keogh Transfer Request Form

Transfer or directly roll over all or a portion of your current IRA, qualified plan or 403(b) plan to your Keogh Plan