

ROLLOVER CONTRIBUTION FORM

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PARTICIPANT INFORMATION (please print)

Name : _____
 Social Security Number : _____
 Address : _____
 City: _____ State: _____ Zip: _____
 Date of Birth : _____ Date of Hire: _____

Telephone Number: _____
 Email Address: _____
 Employer: _____
 Marital Status*: Single Married Divorced

ROLLOVER INFORMATION (check one)

Date of Distribution: _____
 Amount of Rollover: _____

Prior Company Name: _____
 Prior Retirement Plan Name: _____
 Prior Plan Contact & Phone: _____

A: PARTICIPANT-TRANSMITTED ROLLOVER

Attached is my eligible rollover distribution from a qualified retirement plan to roll into the above referenced Plan. I understand the rollover must be made within sixty (60) days of receipt of the distribution and may include only the part of my distribution that is an eligible rollover distribution.

B: DIRECT ROLLOVER FROM TRUSTEE

Participant must request transferring party to include Plan name (as above), participant's name and SSN on check or wire information.

C: DIRECT ROLLOVER FROM IRA CONSISTING SOLELY OF QUALIFIED PLAN DISTRIBUTION

Participant must request transferring party to include Plan name (as above), participant's name and SSN on check or wire information.

ROLLOVER INVESTMENT SELECTIONS

Invest the rollover contribution as shown below. *Please use whole numbers, not fractions.*

BlackRock Health Sciences Opportunities Fund (A) – SHSAX	_____ %	SIP Stable Value Option – SIPSVO	_____ %
iShares S&P 500 Index Investor Fund (A) – BSPAX	_____ %	JPMorgan SmartRetirement Income – JSRAX	_____ %
AllianzGI Technology Fund (A) – RAGTX	_____ %	JPMorgan SmartRetirement 2020 A – JTTAX	_____ %
Invesco Small Cap Growth Fund (A) – GTSAX	_____ %	JPMorgan SmartRetirement 2025 A – JNSAX	_____ %
Columbia Small Cap Value Fund II (A) – COVAX	_____ %	JPMorgan SmartRetirement 2030 A – JSMAX	_____ %
Columbia Mid Cap Index Fund (A) – NTIAX	_____ %	JPMorgan SmartRetirement 2035 A – SRJAX	_____ %
American Funds Washington Mutual Investors Fund (R4) – RWMEX	_____ %	JPMorgan SmartRetirement 2040 A – SMTAX	_____ %
Invesco Equity & Income Fund (A) – ACEIX	_____ %	JPMorgan SmartRetirement 2045 A – JSAAX	_____ %
American Funds EuroPacific Growth Fund (R4) – REREX	_____ %	JPMorgan SmartRetirement 2050 A – JTSAX	_____ %
Loomis Sayles Bond Fund (Retail) – LSBRX	_____ %	JPMorgan SmartRetirement 2055 A – JFFAX	_____ %
MainStay Total Return Bond Fund (I) – MTMIX	_____ %	JPMorgan SmartRetirement 2060 A – JAKAX	_____ %
		TOTAL	100%

ROLLOVER INVESTMENT SELECTIONS

Attach one of the following to this form:

- The distribution statement form from your previous employer's plan
 Your 1099-R form

If you are rolling money over from a Conduit IRA, you must also provide your distribution statement or latest statement of participation from the institution that maintained your IRA.

AUTHORIZATION

I certify that this rollover represents all or part of the taxable portion of a qualified total distribution from my previous employer's qualified plan. I received the distribution from the former qualified plan (or Conduit IRA) within the last sixty (60) days. If the rollover is from a Conduit IRA, I rolled it into that IRA within sixty (60) days of receiving the distribution from my former employer's qualified plan. I have placed no additional money into the Conduit IRA other than rollover contributions from qualified plans.

Signature: _____ Date: _____

PLEASE FAX THIS COMPLETED FORM IN ITS ENTIRETY TO 816.218.0423 OR MAIL TO: Supplemental Income 401(k) Plan
 P.O. Box 8338
 Boston, MA 02266-8338