

Lincoln Public Schools Elective 403(b) Retirement Plan

Section 403(b) Rollover Request Form

Instructions: Use this form if you are a participant in the Lincoln Public Schools Elective 403(b) Retirement Plan (the "Plan") and you want to rollover your money from a previous employer's retirement plan or individual retirement account ("IRA") to the Plan as a direct rollover.

1. Employee Information

Name of Employee _____
Last First MI

Address _____

City _____ State _____ Zip Code _____

Social Security Number _____ Telephone Number _____

2. Current Financial Investment Provider Information. Complete this Section 2 to provide information about the financial institution from which you are requesting a rollover distribution that will be made to your account under the Plan as a rollover contribution.

Name of Institution Account Number

Address _____

City _____ State _____ Zip Code _____

Telephone Number _____ Contact Name _____

3. Assets Being Directly Rolled Over to Plan. Complete the following information to indicate the assets you are having directly rolled over from the financial institution set forth in Section 2 to your account under the Plan.

I want to rollover:

- All of the assets held in my account at the financial institution set forth in Section 2.
- \$ _____ of the assets held in my account at the financial institution set forth in Section 2.

Note: Please attach a copy of your most recent statement for the account described in Section 2.

4. Investment of Assets being Directly Rolled Over to Union Bank. Unless you file new investment instructions with the Plan, the assets being rolled over to your account under the Plan pursuant to this Section 403(b) Rollover Form will be invested pursuant to the investment instructions currently on file with the Plan in connection with your Plan benefits. If you do not have any such investment directions currently on file with the Plan, the assets being rolled over to your account under the Plan pursuant to this Section 403(b) Rollover Form will be invested in the Vanguard Target Retirement Fund that most closely corresponds with the date you will attain normal retirement age under the Plan.

