

8329305

Tax-Deferred Funds Verification

Colorado Public Employees' Retirement Association
PO Box 5800, Denver, Colorado 80217-5800
303-832-9550 or 1-800-759-PERA (7372) • www.copera.org



SSN

____ - ____ - _____

① Member Information

Name _____
Last First M.I.

Daytime Telephone () _____ Service Credit Purchase Agreement number _____

Maximum tax-deferred funds which Colorado PERA can receive under this Service Credit Purchase Agreement:

\$ _____

I authorize my plan administrator, plan custodian, or IRA custodian to release the information requested below to complete my rollover or plan-to-plan transfer.

Member Signature _____ Date _____

② Plan Verification (to be completed by your other plan administrator or plan custodian)

Plan Administrator or Plan Custodian: check the box below for the type of plan from which the tax-deferred money will come. If your plan is not one of these, Colorado PERA cannot accept funds from it. If this is the case, please return this form with "Unacceptable plan" checked and do not issue a check to Colorado PERA on behalf of this individual.

- 401(a) plan
- 401(k) plan
- 401(c) Keogh plan
- Governmental 457 plan
- 403(b) tax-sheltered annuity or a 403(b)(7) custodial account
- Unacceptable plan (return form to Colorado PERA)

Approximate amount of tax-deferred distribution \$ _____ (cannot exceed the above maximum amount; any excess will be returned to the plan administrator)

Note: Colorado PERA can only accept tax-deferred (pre-tax) funds via a rollover or transfer. If this account has any tax-paid (after-tax) money in it, your check to Colorado PERA for this individual can only be for the tax-deferred money.

Date of Distribution _____ Name of Plan _____

Signature _____ Plan Administrator Plan Custodian

Print Name _____ Telephone () _____

③ IRA Verification (to be completed by your IRA custodian)

Amount of tax-deferred distribution to be rolled over to Colorado PERA \$ _____ (cannot exceed the above maximum amount; any excess will be returned to the IRA custodian)

Note: Colorado PERA can only accept tax-deferred (pre-tax) funds via a rollover. If this account has any tax-paid (after-tax) money in it, your check to Colorado PERA for this individual can only be for the tax-deferred money.

Date of Distribution _____ IRA Custodian Issuing Distribution _____

Signature _____ Telephone () _____

Print Name _____