

Letter of Acceptance for Direct Rollover to a Qualified Retirement Plan

Please return this Letter of Acceptance with a completed IRA Distribution Request Form. This document must be printed on company letterhead in order to complete processing.

If funds are going to a Traditional, Rollover or Roth IRA this is not considered a direct rollover and this form should not be used.

Participant Name	_____
Indicate Type of Rollover	<input type="checkbox"/> 401a <input type="checkbox"/> 401k <input type="checkbox"/> 403b <input type="checkbox"/> Profit Sharing (PSP)
Account Number Funds are Transferring To	_____
Payment Instructions	<p>Make check payable to:</p> _____ _____ <p>Mail check to:</p> _____ _____ _____
Acceptance of Funds	<p>_____ (Successor Custodian Name), hereby agrees to accept funds from the current custodian, Pershing LLC and deposit them into a qualified retirement plan on behalf of the participant identified above in accordance with the applicable provisions of the Internal Revenue Service Code.</p>
Authorized Signature	<p>_____ _____ Plan Administrator Signature Date _____ Title</p>

RETURN COMPLETED FORM TO:
ALIGHT FINANCIAL SOLUTIONS
PO BOX 563901
CHARLOTTE NC 28256-3901
FAX: 1.847.554.1444