

Submission of this form initiates a transfer/rollover into the SchoolsFirst/Nationwide Retirement Builder Plan 403(b)/457(b), 401(a) from a Coronavirus-Related Distribution.

NOTE: Please allow 5 business days for approval of this request. Please make check payable to: Nationwide Retirement Solutions, FBO (Participant Name, SSN, Acct#) and mail to Nationwide, PO Box 183150, Columbus, OH 43218.

Participant Information

Name: _____

SSN or Nationwide Account Number: _____ Date of Birth: _____

Preferred Phone Number: _____ Phone Type: Home Work Cell

Email: _____

School District: _____ Plan Number: _____

Financial Advisor Name: _____ Advisor ID: _____

How would you like to be contacted if additional information is required? Email Phone

*Nationwide strives to provide excellent customer service to our Members. By providing your telephone number, you authorize Nationwide to contact you via telephone using automated technology to assist you with your account.

Type of Transaction

Funds from a Coronavirus-Related Distribution (Required)

Rollover TO (Select one if requesting rollover):

403(b) Pre-Tax 457(b) Pre-Tax 401(a) Pre-Tax

Fund Origination Information (where CRDs distributed from)

Type of Existing Account:

403(b) 457(b) 401(k) 401(a) Other: _____

Origination Plan: Originated from receiving plan (Event Related)
 Originated from a different plan (Event Unrelated)

Amount:

100% (Amount: \$ _____)

Partial Amount: \$ _____

NOTE: Amount cannot exceed the Original Full Amount of Distribution listed above (up to \$100,000). Amount cannot include any ROTH funds.

Investment Election

Use my existing allocation mix (Default if nothing selected)

Create a custom allocation mix for rollover/transfer funds only (Must total 100%. This does not change existing allocations.)

Fund Name: _____ %

Fund Name: _____ %

Fund Name: _____ %

Fund Name: _____ %

Total Percentage (100%) _____ %

