

City of Philadelphia Deferred Compensation Plan

Incoming Assets Form

Personal Information						
Participant Name:		SSN or Account Number:				
Mailing Address:						
City, State, & ZIP:		Phone Number:				
Payroll Number:		Date of Birth:				
Email Address:						
How would you like to be contacte	d if additional informatic	n is requ	uired? 🗌 Teler	ohone 🗌 Email		
Rollover/Transfer Funds Fror	n					
□ 401(a) Governmental □ 403(b) Governmental □ 401(k) Governmental □ 401(k) Governmental □ Roth 401(k) □ F	11 401(a) Qualified/Non Gov 403(b) Qualified/Non Gov 401(k) Qualified/Non Gov Roth 403(b) Fraditional IRA	vernmer	ntal []401(a) Drop]457(b) Governmental]Deemed Traditional IRA]Deemed Roth IRA]TSP (Thrift Savings Plar		
Carrier/Custodian Name:			Account Number:			
Address:			Contact Name:			
City, State, & Zip Code:			Contact Phone Number:			
Rollover/Transfer Funds To						
)		Dollar Amount \$ ccount Balance \$		
457(b) to 457(b) Incoming A	ssets					
when the assets are available for dis I have severed from employment from the difference between a transfer at Following a Transfer, withdrawal of (e.g. Severance of employment or Following a Rollover, withdrawal of Please make your selection:	om my previous employed and rollover: f assets is permitted only age 70 $\frac{1}{2}$.) If assets is permitted at a	er on / when t	he account ho	·		
Investment Direction to Natio						
☐ Credit my rollover/transfer accor		OR	☐ Credit my	rollover/transfer as liste	d below:	
allocation on file ou do not indicate your allocation choices, r rollover will be credited to your current allocation.			Investment Option Percent			
dditionally, if you select an investment option that is sed, your rollover/transfer will be credited to the guard Target Retirement Fund closest to your age			Must total 100%			
Authorization						
I hereby elect and authorize the ropre-tax rollover/transfer into an eligicertification. I expressly assume re Nationwide shall not be responsible Upon receipt, I hereby request my frimpose a short-term trade fee. Plea Nationwide Retirement Solutions he deposit the proceeds within 5 busing	gible retirement plan. Na sponsibility for tax consectors for those tax consequer unds to be invested as directors read the underlying pereby agrees to accept the	etionwid sequence nces. rected o prospect ne rollov	e Retirement S es relating to n this form. I un uses carefully. er/transfer des	Solutions is entitled to r this rollover/transfer, ar nderstand that some mu cribed herein and upon	ely fully on my nd I agree tha tual funds may receipt will	
Important: Please liquidate and tra	nsfer all securities neces	sary to o	complete this t	ransaction.		
Participant Signature:				Date:		
Retirement Specialist Name (Print)):			Date:		
Please note: *A Medallion Signature Please contact your surrendering fi			Medallion	Signature Guarantee St	amp Here	