

# Rollover Into a Slavic & PlanRight 401(k) Form

## Plan Information:

The following information is required in order to process rollovers into a qualified 401(k) Plan at Slavic/ PlanRight. (Also note, your previous plan Administrator/ Custodian will require that you complete their transfer forms in order to initiate the rollover process.) Please indicate the investment vehicle in which these rollover funds originated from:

(Select one please)

<input type="checkbox"/> Qualified 401(k) Plan	<input type="checkbox"/> Traditional IRA
<input type="checkbox"/> Conduit IRA	<input type="checkbox"/> Governmental 457 Plan
<input type="checkbox"/> IRC 403(b) Plan	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Roth 401(k) (see note below)	

## Participant Information:

Participant (First Name)	(M.I.)	(Last Name)
Street Address	City	State Zip
Phone (Home)	Phone (work)	Email
Current Worksite Employer	Current Payroll Company	Date of Hire

Please make check payable in U.S. Dollars to **Depository Services, Inc.**  
FBO: \_\_\_\_\_  
401(k) Participant Name & Social Security Number

Participant Signature & Date

*You may use this form for a direct rollover or for an indirect (60 day) rollover. If you have already received a check from your prior investment provider and would like to make an indirect, please be sure to include a check, payable to Depository Services, Inc., and a distribution statement from your prior investment provider.*

*Please note: A rollover contribution must be received within 60 days of your receipt of such distribution. Slavic reserves the right to require sufficient evidence that your distribution is from an eligible retirement plan or IRA.*

*Rollover of **Roth 401(k)** funds will be accepted only if your plan supports the Roth option.*

**Please return this form with Rollover check to:**  
**Slavic Integrated Administration**  
**1075 Broken Sound Parkway NW, Suite 100**  
**Boca Raton, FL 33487-3540**  
**Tel: 800-356-3009**

You may also fax or email this form to: Fax: 561- 241-1070 Attn: Gita Rahmani  
Email: [gitar@slavic.net](mailto:gitar@slavic.net)

