



**Step One:**

Participant Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Name of Former Retirement Plan Provider: \_\_\_\_\_  
(Hint: Who do you receive your statement from?)

Former Employer Retirement Plan Name: \_\_\_\_\_

**Step Two:**

- Contact your prior retirement plan provider to initiate your rollover distribution to The Standard.  
The check from your prior retirement plan provider must be made payable to the custodian listed below. If the check is payable to you, please endorse as: Payable to (custodian listed below)

Mail the check to the following address:

**Regular Mailing Address**

Reliance Trust Company  
FBO: (Participant's Name)  
Custodian Account No. 0150974178  
Mail Stop 579  
PO Box 5396  
Carol Stream, IL 60197-5396

**Overnight Mailing Address**

Reliance Trust Company  
FBO: (Participant's Name)  
Custodian Account No. 0150974178  
Box 5396 Mail Stop 579  
270 Remington Blvd Ste B  
Bolingbrook, IL 60440

- Request a copy of your most recent retirement plan statement.
- For Roth Contributions, please confirm the following with your prior retirement plan provider to ensure taxation on future Roth distributions is accurate:

Date of First Roth Contribution:	_____
Total Roth Contributions	\$ _____
Total Earnings on Roth Contributions	\$ _____
Approximate Check Total (sum of above)	\$ _____

Note: Roth IRAs cannot be rolled into this plan.

**Step Three:**

**Sign and Date**

I hereby certify to the best of my knowledge that the rollover contribution made to this plan is eligible for rollover. This includes, but is not limited to certifying the distribution did not come from a beneficiary account, was not a required minimum distribution and was not one of a series of periodic payments. If the distribution was not one of a series of periodic payments, and if an indirect rollover, then the distribution was received not more than sixty days before the date of the rollover. Distributions eligible for rollover into this plan will be determined by my Plan Administrator and may include: distributions from a 401(a), 401(k), 403(b), governmental 457(b) plans, an IRA, a Roth 401(k), or a Roth 403(b) plan. If my distribution includes after-tax amounts, I understand that those amounts can only be rolled over if my plan accepts those contributions and if I provide information related to the cost basis of those amounts. I understand that if this rollover is accepted, it will be directed to investments based on my contribution directives in place at the time the rollover is received by The Standard. If I do not have directives in place, the rollover will be placed into the plan's default investment option. For more information on eligible rollover distributions please see IRS website (<https://www.irs.gov/retirement-plans/>).

PARTICIPANT SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

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## Step Four:

Submit this application for rollover form and a copy of your most recent statement from your prior provider to The Standard. Choose one of three options below:

**Email to:** [Rolloverforms@standard.com](mailto:Rolloverforms@standard.com)

**Fax to:** 971-321-7998

**Mail to:**  
Standard Retirement Services, Inc.  
1100 SW 6<sup>th</sup> Avenue  
Portland OR 97204-1020

### PLEASE NOTE:

- If the distribution check was made payable to you, the rollover funds and a check for any taxes withheld from your eligible distribution, must be received by The Standard within 60 days of the date on the distribution check. Please send a cashier's check not exceeding the gross distribution amount using the mailing instructions under step two.
- Certain types of distributions are not eligible for rollover, including: required minimum distributions, non-taxable payments (after-tax contributions) from IRAs, Roth IRAs, periodic payments for your life or for a period of 10 years or more and hardship withdrawals.
- A rollover check that is received at The Standard will be returned if a completed Application for Rollover is not received within 30 business days.

*If you need assistance completing this form or have questions, please call a customer service representative at 800.858.5420.*