

Distribution / Transfer / Loan Request Form

Instructions: To Facilitate processing, this form should accompany any contract exchange, rollover, distribution, or loan request paperwork provided by your 403(b) company or representative. This form must be completed by the employee and/or agent.

IMPORTANT! ☐ Please check this box if you are returning additional information for a previously submitted transaction.

Employer

Employee Name

Employee Mailing Address

City, State, Zip

Employee Phone

Employee Email

Termination Date (If Applicable)

SSN

DOB

Please check all your inputs for accuracy.

I am requesting a ☐ Distribution ☐ Loan from my 403(b) or 403(b)(7) account with _____ (Company Name)

☐ In service Contract Exchange ☐ IRA Rollover ☐ Transfer from 403(b) , 403(b)(7) , 457(b) account with

(Company Name)

to _____
(Company Name)

(Transaction form is invalid if date signed is more than 90 days from date of attached forms.)

Employee Signature

Date Signed

Once completed, GLP Strategic Administrative Group should forward this form and all paperwork associated with this transaction to:

☐ Employee (to same address as above)

☐ Representatives Name _____

Send to the following fax
or mailing address:

Fax

Address

Address

Representatives e-mail _____

☐ Company - Send to the following fax or mailing address:

Fax

Address

Address

Submit Completed Form and All Accompanying Paperwork To:

GLP Strategic Administrative Group
37000 W. 12 Mile Rd. Suite 101
Farmington Hills, Mi. 48331
Fax: 248-876-9657

DO NOT WRITE IN THIS SECTION

Transaction Request Approved:

Printed Name

Date Signed

Signature

Title