

Wyoming Retirement System Rollover Acceptance Form

Must accompany WRS-8(a) Form

(Both sections must be completed if funds are being rolled from WRS into another Financial Institution)

Section 1 - (To be completed by Member)

I have closed my account with the Wyoming Retirement System and have instructed them to roll my funds into my account with your financial institution. The Wyoming Retirement System is a qualified retirement plan as defined under section 401(a) of the Internal Revenue Code.

I assume full responsibility for the direct rollover transaction and will not hold the Plan Administrator, Trustee, Custodian, or issuer of either the distributing or receiving plans liable to any adverse consequences that may result.

Member's Name: _____

Social Security Number: _____

X _____
Member Signature Date

Section 2 - To be completed by New Institution and/or Trustee/Custodian

Make Check Payable to: _____

FBO: _____

Mailing Address: _____

City, State, Zip: _____

Telephone Number: _____

As an authorized administrator of this financial institution, we agree to serve as successor custodian/trustee for the assets of your above-named member. I certify the funds will be placed into: (please check one only)

a traditional IRA OR an eligible employer plan*

Type or Print Name of Authorized Administrator/Trustee

Authorized Administrator/Trustee's Title

X _____
Authorized Administrator/Trustee's Signature

Date

► **Note: Check will be mailed to the above address**

* An "eligible employer plan" includes a plan qualified under section 401(a) of the Internal Revenue Code, including a 401(k) plan, a section 403(a) annuity plan, a section 403(b) tax-sheltered annuity, or an eligible section governmental 457(b) plan.

<i>WRS Office Use Only</i>
Entered: _____
Verified: _____