

ROLLOVER CONTRIBUTION FORM

- Use this form to make a rollover contribution to the plan.
- If you have not already done so, you must also complete a "Beneficiary Designation Form."
- Your choices on this form may affect your taxes. You may want to consult a tax or financial advisor.
- Please return completed form to:

US Postal Mail (including USPS Express Mail) – Putnam Investments, P.O. Box 9740, Providence, RI 02940-9740.
Other Courier Mail – Putnam Investments, Investors Way, Norwood, MA 02062.

1. Participant Information Please print clearly in CAPITAL LETTERS.

_____ - _____ - _____
 Social Security Number

_____ - _____ - _____
 Date of Birth (MM-DD-YYYY)

Marital Status
 Married
 Not Married

_____ MI
 Last Name First Name

_____ Apt. #
 Mailing Address

_____ Zip Code
 City State

_____ M _____ F
 Gender

_____ Daytime Telephone Number
 Evening Telephone Number

_____ E-mail Address (Home)
 _____ E-mail Address (Work)

2. Rollover Contribution Election

You may request that the plan accept a rollover of pre-tax amounts distributed from a traditional IRA or of any amount that is an "eligible rollover distribution," as described in the Special Tax Notice Regarding Plan Payments that should have been provided to you when you received a distribution from your prior employer's plan. Certain distributions – for example, installment payments that are part of a series running for 10 years or more, "hardship distributions," "required minimum distributions" after you reach age 70 1/2, or distributions of after-tax and nondeductible contributions from an IRA – are not eligible for rollover. If you are requesting a rollover contribution of a distribution you received as either a surviving spouse or a former spouse who is an alternate payee under a "qualified domestic relations order," please complete the following elections as if the distribution was being made from your plan.

I request that the plan accept the following rollover contribution (*check one*):

- A "direct rollover" from (*check one*):
- My former employer's qualified plan
 - My former employer's 403(b) plan or governmental 457 plan
 - My traditional IRA
- (*Select one method*):
- I have attached a check from my former employer's plan or my IRA payable to "Mercer Trust Company, f/b/o [my name]," in the amount of \$_____.
 - My former employer's plan or my IRA will transfer approximately \$_____ directly.
(*check and complete if applicable*)
 - My "direct rollover" contribution contains after-tax employee contributions from my former employer's qualified plan in the amount of \$_____. Earnings on these contributions are \$_____.

- An "indirect rollover" from (*check one*):
- Note: You may not indirectly roll over nondeductible IRA contributions or other after-tax amounts held in an IRA or former employer's plan.

- My former employer's qualified plan
- My former employer's 403(b) plan or governmental 457 plan
- My traditional IRA

I have attached a personal check, payable to "Mercer Trust Company," in the amount of \$_____.

Were you born prior to 1936? Yes No

If yes, is the money from another type of employer plan (e.g., 403(b) plan or governmental 457 plan) or a traditional IRA that is not a conduit IRA?
 Yes No

Note: If you check yes to both questions, you may lose special tax benefits that would otherwise be available to you upon a subsequent distribution from this plan.



