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 Fax: 717.772.3860
 PSRS- 928 (07/2019)

Rollover Certification Form



Mail Center

INSTRUCTIONS: This form is to be completed to roll over eligible distributions to the Pennsylvania Public School Employees' Retirement System (PSERS). PSERS is a qualified pension plan under Section 401(a) of the Internal Revenue Code. PSERS will accept direct rollovers and participant rollovers from any of the retirement plans listed below. A direct rollover is paid directly from one financial institution or eligible retirement plan to another for the benefit of the plan member. A participant rollover is transacted by the member and must be rolled over within 60 days from the date the member receives the eligible rollover distribution. This completed form should accompany the member's check for a participant rollover. Checks should be made payable to Pennsylvania Public School Employees' Retirement System.

A	Member Information
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Member Name	
Social Security Number	
Gender	
Date of Birth	
Former Last Name (only if used in this System)	

Member Address Change		<input type="checkbox"/> Check here if new address
Apt# or Suite		
Delivery Address		
City		
State & Zip Code		
Daytime Phone		
Evening Phone		
Email Address (Optional)		

B	Maximum Rollover Amount <i>(to be completed by PSERS member)</i>
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The amount of your rollover may not exceed the amount due to PSERS for the purchase of creditable service or the amount due for the elimination of the effects of a frozen annuity. The amount due for the purchase of creditable service or the amount due for the elimination of the effects of a frozen annuity is shown on the *Statement of Amount Due*, sent under separate cover.

Rollover Amount

The accompanying transfer of funds includes the following rollover amounts:

For purchase of service	\$ _____
For elimination of the effects of frozen annuity	\$ _____
Total	\$ _____*

*PSERS will not accept rollover checks that exceed the amount due to PSERS as shown on your *Statement of Amount Due*.

C**Rollover Certification***(to be completed by financial institution representative for a direct rollover or by a PSERS member for a participant rollover)*

I certify that the accompanying funds are eligible to be rolled over into a qualified pension fund.

Please check the appropriate distribution source of this rollover:

- Qualified plan described in section 401(a) of the Internal Revenue Code
- Safe Harbor 401(k) plan as described in section 401(k)(12) of the Code
- Simple 401(k) plan as described in section 401(k)(11) of the Code
- Qualified plan described in section 403(a) of the Code
- Annuity contract or tax sheltered annuity described in section 403(b) of the Code
- IRA as described in section 408(a) and section 408(b) of the Code
- Simplified Employee Plan (SEP) as described in section 408(k) of the Code
- Simple IRA as described in section 408(p) of the Code
- Deferred Compensation Plan as described in section 457 of the Code

Note: Only pre-tax (taxable) distributions are eligible for roll over to PSERS.

Name and address of plan from which the rollover is being distributed (Street, City, State and Zip Code)	
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Financial Institution Authorized Signature <i>(for direct rollovers only)</i>	Date
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Member Signature <i>(for participant rollovers only)</i>	Date
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