

Direct Trustee to Trustee Transfer

Purpose of the Form

- Use this form to make direct trustee to trustee transfers.

Instructions

- Complete the form in blue or black ink.
- CCCERA cannot accept a transfer that exceeds the cost to purchase the "permissive service credit"; and
- A transfer of ineligible funds to CCCERA may cause adverse income tax consequences, and CCCERA is not responsible for those tax consequences.
- A transfer is limited to the purchase of "permissive service credit." Permissive service credit includes military service, prior public service credit, redeposit of previously withdrawn contributions, leave of absence, and time prior to membership.
- **To process the trustee-to-trustee transfer, this form must accompany any form(s) required by your Plan Sponsor.**

| Member Information | | |
|--------------------|-------------------|----------|
| Full Name | Social Security # | |
| Street or P.O. Box | Apt. # | |
| City | State | Zip Code |

| Source of Funding | |
|--|-------------------|
| Name of Plan or Financial Institution | |
| I understand that the trustee-to-trustee transfer must be received in the Retirement Office no later than: | Date – mm/dd/yyyy |
| Member Signature | Date – mm/dd/yyyy |

| FOR RETIREMENT STAFF USE ONLY | |
|--|----------------------------|
| Type of Service | Years of Service Purchased |
| Tier Service Purchase to be credited to | Cost of Purchase |
| The trustee-to-trustee transfer must be received in the Retirement Office no later than: | Date – mm/dd/yyyy |
| I hereby certify that the service purchase is eligible for a trustee-to-trustee transfer and that the cost to purchase is correct as stated above. | |
| Signature of Retirement Counselor making certification | Date – mm/dd/yyyy |