



**APPLICATION FOR ROLLOVER  
CONTRIBUTION TO TAX-DEFERRED  
RETIREMENT ACCOUNT (TDRA)**

Complete this Application for Rollover Contribution to Tax-Deferred Retirement Account (TDRA) to rollover money from your former employer's retirement plan or a traditional IRA to your 403(b) account under the Tax-Deferred Retirement Account of the Pension Fund of the Christian Church (Disciples of Christ) ("TDRA"). You must already have a 403(b) account under the TDRA or contemporaneously complete and return a TDRA Enrollment Form along with this Application before you can rollover money into the TDRA. A rollover can be accomplished in one of two ways:

- **Direct Rollover:** You may instruct the plan administrator of the distributing plan to directly transfer the *pre-tax* amounts payable to you under the retirement plan or IRA to the TDRA.
- **Indirect Rollover:** After having received money from the distributing plan, you may deposit the *pre-tax* amounts you received to the TDRA, so long as the deposit is made within 60 days of the date you received the money from the distributing plan. If you miss the 60-day rollover deadline, you may be eligible to self-certify that you meet an exception to the 60-day rollover requirement by completing the Certification for Late Rollover Contribution Form.

If you are age 70½ or will attain age 70½ this calendar year, you must satisfy any minimum required distribution requirements prior to a rollover or leave the required distribution amount in the distributing plan and withdraw it prior to the distribution deadline.

**You must complete a separate Application for each distribution eligible for rollover. Return the completed Application, supporting financial statements (i.e. a copy of the most recent account statement), and, if applicable, a check from the current trustee or custodian or, if an indirect rollover, your personal check, to:**

Pension Fund of the Christian Church  
P.O. Box 6251  
Indianapolis, IN 46206-6251

**IMPORTANT:** Retain a copy of this completed Application for your records. For assistance, please call 317-634-4504 or toll-free 866-495-7322.

**- PLEASE TYPE OR PRINT CLEARLY -**

**I. MEMBER INFORMATION**

Member Name \_\_\_\_\_ Account No. \_\_\_\_\_  
(first) (middle) (last/family name) (if also opening a TDRA, write "TBA")

*Check here if there has been a change to your contact information on file.*

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Country \_\_\_\_\_ Zip Code \_\_\_\_\_ - \_\_\_\_\_

Daytime Phone Number ( \_\_\_\_\_ ) E-Mail Address \_\_\_\_\_

**II. ROLLOVER INFORMATION**

Rollover is a (*check one only*):

- Direct rollover from an employer plan (401(a), 401(k), 403(b), or governmental 457(b)).
- Indirect rollover of a distribution paid to you from an employer retirement plan (401(a), 401(k), 403(b), or governmental 457(b) or individual retirement account or annuity (IRA)) within 60 days of receipt. *If you are making an indirect rollover past the 60-day deadline, you must also attach a Certification for Late Rollover Form.*

If you are a minister, check the applicable box:

- My entire rollover represents income received for services performed while a minister and in the exercise of my ministry.
- \$ \_\_\_\_\_ of my rollover represents income for services performed while a minister and in the exercise of my ministry.

**Attach a copy of the most recent account statement from the custodian/trustee/administrator of the distributing plan, or in the event of an indirect rollover, a copy of the distribution statement from the custodian/trustee/administrator of the distributing plan reflecting the gross amount of the distribution and any federal and state taxes withheld.**

Name of Distributing Plan \_\_\_\_\_ Account/Contract No. \_\_\_\_\_

Name of Custodian/Trustee/Administrator \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Country \_\_\_\_\_ Zip Code \_\_\_\_\_ - \_\_\_\_\_

Phone Number ( ) \_\_\_\_\_

Approximate Account Value \$ \_\_\_\_\_

**Rollover Instructions for Custodian/Trustee/Administrator of the Distributing Plan (for Direct Rollovers Only).** Please roll over the full or partial value of the account or contract identified above as a direct rollover to the 403(b) account under the TDRA, a section 403(b)(9) retirement income account plan maintained by Pension Fund of the Christian Church, as follows:

- Liquidate and process a partial distribution of \$ \_\_\_\_\_ or \_\_\_\_\_ % of my account or contract as a direct rollover to my TDRA account.
- Liquidate and process a distribution of my entire account or contract as a direct rollover to my TDRA account.

**Remit proceeds by check made payable to:** **Pension Fund of the Christian Church**  
**For the benefit of [Insert Name of Account or Contract Holder]**  
**P.O. Box 6251**  
**Indianapolis, IN 46206-6251**

**III. MEMBER CERTIFICATION AND SIGNATURE**

By signing this Application, I make the following certifications:

- I certify that all of the following are true:
  - The distributing plan/IRA is an eligible retirement plan under Code Section 402(c)(8), which includes an IRA, a 401(a) plan (including a 401(k) plan), a 403(a) plan, a 403(b) plan, or a governmental 457(b) plan; and
  - The distribution from the eligible retirement plan is an eligible rollover distribution under Code Section 402(c)(4) that is not: (i) one of a series of substantially equal periodic payments made for my life, for the joint lives of me and my designated beneficiary, or for a specified period of 10 years or more; (ii) a required minimum distribution under Code Section 401(a)(9); (iii) a hardship distribution; or (iv) a qualified disaster relief distribution; and
  - The distribution consists only of amounts that would be taxable to me if directly distributed to me; and
  - If the rollover is an indirect rollover, the distribution is being contributed to my 403(b) account under the TDRA within 60 days after my receipt of the distribution from the eligible retirement plan, or I certify that my circumstances meet an exception to the 60-day rollover requirement, as provided in the attached Certification for Late Rollover Contribution Form.
- I understand that I am responsible for any tax consequences arising from this transaction and for any fees imposed by the distributing plan. I also understand that Pension Fund will rely on the representations I have made on this Application, and I hereby release Pension Fund from any liability regarding the accuracy of these representations.
- In support of these certifications, I am attaching a copy of the most recent account statement from the distributing plan's custodian/trustee/administrator, or in the event of an indirect rollover, a copy of the distribution statement from the custodian/trustee/administrator reflecting the gross amount of the distribution and the federal and state taxes withheld. My signature on this Application authorizes the custodian/trustee/administrator of the distributing plan to release any and all information regarding my account to Pension Fund in any form requested by Pension Fund.

**Member Signature** \_\_\_\_\_ **Date** \_\_\_\_/\_\_\_\_/\_\_\_\_

**IV. ACCEPTANCE BY PENSION FUND**

In reliance on the above certifications, Pension Fund agrees to accept the above direct or indirect rollover for your benefit. The direct or indirect rollover amount will be credited to your 403(b) account under the TDRA.

**Pension Fund Representative Signature** \_\_\_\_\_ **Date** \_\_\_\_/\_\_\_\_/\_\_\_\_

**Printed Name** \_\_\_\_\_

**Please remit a copy of this completed Application with a copy of the check for your direct or indirect rollover distribution to Pension Fund. The form Application be fully completed and signed in order for Pension Fund to process this request. It is very important that you make a photocopy of this Application for your records.**

**Pension Fund of the Christian Church**  
 P.O. Box 6251, Indianapolis, Indiana 46206-6251  
 Toll Free Phone: 1.866.495.7322 • Phone: 317.634.4504 • Fax: 317.634.4071  
 E-mail: [pfcc1@pensionfund.org](mailto:pfcc1@pensionfund.org) • Website: [www.pensionfund.org](http://www.pensionfund.org)