



# The Standard®

Standard Retirement Services, Inc.  
1100 SW Sixth Avenue Portland OR 97204-1020  
971.321.7998 Fax

## Application for 403(b) Transfer

To transfer assets from another Internal Revenue Code section 403(b) account to an account with The Standard, first contact your current provider to initiate the transfer. Then complete this form to notify The Standard that you are transferring assets. Fax this completed form to 971.321.7998

May we contact your prior provider to assist with the transfer process? ☐ Yes ☐ No

### PARTICIPANT INFORMATION

Participant Name	Social Security No.	Date of Birth
Mailing Address	City	State Zip Phone No.

### CURRENT PROVIDER INFORMATION

Current 403(b) Provider Name	Contract or Account No.
Current 403(b) Provider Address	

### AMOUNT AND SOURCE OF FUNDS

Estimated employee pre-tax deferral source transfer amount:	_____
Estimated employer contribution source transfer amount:	_____
Estimated Roth after-tax employee deferral source amount:	_____
TOTAL estimated transfer amount:	_____

### SPECIAL INSTRUCTIONS TO CURRENT PROVIDER *Please liquidate the annuity contract or custodial account identified above and transfer the assets to:*

Reliance Trust Company Attn: The Standard Team 1100 Abernathy Road Building 500, Suite 400 Atlanta GA 30328 Account Number: 0155817067 For Benefit Of (my name): _____ Contract Number: 807078 I understand that this transfer is intended to qualify as a contract exchange or transfer under applicable regulations, and will not constitute actual or constructive receipt for federal income tax purposes. I understand these assets will be treated as pre-tax or Roth contributions and earnings as identified above and will be invested according to my investment directives currently on file with The Standard or, if I do not have investment directives on file, in a default fund identified by a plan fiduciary. I acknowledge the information provided above is true and complete.	
Participant Signature	Date

The Plan Sponsor has adopted or will adopt a written 403(b) Plan ("Plan"), which will include The Standard as an approved Provider to receive exchanges/transfers. It is the Sponsor's intent that the written plan will meet the requirements of section 403(b) of the Internal Revenue Code ("Code") and the regulations thereunder. The Standard will make available investment options meeting the requirements of section 403(b) of the Code to Plan participants.

The Standard will accept the transferred funds for the benefit of this Plan participant and apply the restrictions of Code section 403(b) as applicable.

#### Dexter Community Schools 403(b) Plan

Print Name of Sponsor \_\_\_\_\_  
Authorized Signature: Sharon Raschke  
Print Name: Sharon Raschke  
Title: Executive Director of Finance and Business  
Email Address: raschke@dexter.k12.mi.us

#### The Standard

Signature: Larry Costa  
Print Name: Larry Costa  
Title: Client Service Consultant