

TRUSTEE-TO-TRUSTEE TRANSFER/ DIRECT ROLLOVER FORM FOR LARGER ANNUITY

TO BE COMPLETED BY MEMBER

I hereby authorize the following trustee-to-trustee transfer/direct rollover to LACERS for placement in a Larger Annuity account:

Member's Name (Please Print)

Employee ID Number

Retirement Date

Transfer the whole balance in the Account

Transfer a specific amount \$ _____

Name of Plan

Account Number

Address of Plan

Member's Signature

Date

Please note: You can transfer funds from any eligible retirement plan as defined in Section 402(c)(8)(B) of the Internal Revenue Code. Please contact your plan administrator to ensure they meet this qualification prior to completing and submitting this form to them.

FOR DISTRIBUTING PLAN SPONSOR

LACERS is a qualified defined benefit plan that accepts a direct trustee-to-trustee transfer of funds from an eligible retirement plan as defined in Section 402(c)(8)(B) of the Internal Revenue Code. Roth IRA rollovers are not permitted. If possible, please return this completed form to LACERS with the distribution check payable to *Los Angeles City Employees' Retirement System*. Please include the Member's name on the note section of the check.

Please complete the following information and return this form to the address at the top of the form.

I certify that the _____ is an eligible retirement plan as defined in
(Print Name of Plan)
 Internal Revenue Code Section 402(c)(8)(B).

Print Name

Title

Contact Telephone Number

Signature of Plan Administrator

Date

CITY OF LA DEFERRED COMPENSATION PLAN

Los Angeles Administrative Code, Sec. 4.1021. Larger Annuity Program.

Solely for the purpose of making additional contributions to provide a larger annuity benefit at the time of retirement, the Board of Administration may accept, subject to any limitations imposed by federal law, a direct rollover distribution of funds from the City of Los Angeles 457 Deferred Compensation Plan after the date of the member's retirement provided that: the member's application to purchase a larger annuity benefit is received prior to the effective date of the member's retirement; the member, prior to the member's retirement, shall have provided the Deferred Compensation Plan with the written authorization that is required for funds to be transferred to the Retirement System immediately after the member's retirement; the rollover is completed as soon as administratively feasible; and the larger annuity benefit is not payable to the member until after the funds have been received.

ADA NOTICE

As a covered entity under Title II of the Americans with Disabilities Act, the City of Los Angeles does not discriminate on the basis of disability and, upon request, will provide reasonable accommodations to ensure equal access to its programs, services, and activities.