

## **ROLLOVER FORM**

ROLLOVER ASSETS WILL BE ALLOCATED TO THE MEMBER 401K ROLLOVER SOURCE Please return this form to: Local No. 8 Retirement Plan, PO Box 60408, Rossford, OH 43460

OCIAL SECURITY NUMBER  AST NAME		BIRTH DAT	E	
AST NAME				
	FIRST NAME	MIL	DDLE INITIAL	
TREET ADDRESS	CITY	STATE	ZIP CODE	
OAYTIME TELEPHONE NUMBER	() EVENING TELEPHONE NUM	MBER E-MAIL A	ADDRESS	-
<b>-</b>		1		
2. ROLLOVER CONTRIBU				
	TAXABLE PORTION (include investment income)	(e.g., partic contr	CAXABLE cipant after-tax cibutions)	TOTAL Rollover Contribution
Amount of Rollover Contribution:	\$	+ \$		<u>=</u> \$
<b>PAYMENT:</b> Make payable to Reliance Bacheck.	nk. Include the employee's last 4 d	igits of the social secur	ity number and the new	plan's account number
☐ Check attached ☐ Provide a completed Direct Rollover	Wire or Check sent separately to Request form to your Prior P		<del>-</del>	

# 3. SELECT INVESTMENT STRATEGY

Your investment strategies are outlined on the following pages. Choose the solution that best suits you and your investment style. IMPORTANT NOTE: This investment election applies to all future contributions. When selecting your investments, choose only ONE portfolio from any of the strategies or build your own portfolio under option C. The investment options available in this plan may change at the direction of the Plan Sponsor.

Until you make your investment selection, your contributions will be invested in the Target Asset Allocation option listed below which has the target retirement date closest to your 65<sup>th</sup> birthday. Subject to restrictions, you may redirect your contributions to any other investment option under the Plan at any time.

## A. Age-Based Investment Option

TargetAssetA	Allocation Investment Optio	<b>ns</b> are single solutions that of	fer professional management and mo	nitoring as well as					
diversification o	all in one investment. Each inves	ment option has an automatic	process that invests more conservative	vely as retirement nears and the					
options are name	ed to coincide with a particular 1	etirement date. Your plan is de	esigned to invest your contributions in	to one of these options as the					
default investme	nt based on your date of birth and	a projected retirement age of 0	65. You may always choose new inves	tment options at any time.					
IBEW 8 T. Rowe Price Ret 2015 IBEW 8 T. Rowe Price Ret 2040	☐ IBEW 8 T. Rowe Price Ret 2020 ☐ IBEW 8 T. Rowe Price Ret 2045	Ret 2025	Ret 2030	Ret 2035	re				
OR									
Custom portfolios, ba	a Portfolio Investissed on different risk tolerances, in Portfolio options are shown of	nave been arranged using the in	ndividual funds available to your plan	n. The amounts of each individual f	und contained				
Short Term	Conservative	Moderate	Aggressive	Ultra Aggressive					
		OR			_				

### C. Individual Fund Option

First, select the individual funds in which you wish to invest. Then, enter the percentage of your contributions to be invested in each of those funds in the space

INVESTMENT OPTION		SHORT- TERM	CONSERVATIVE	MODERATE	AGGRESSIVE	ULTRA AGGRESSIVE
IBEW 8 Stable Value	0/	85%	60%	37%	15%	_
Fund	_%	83%	00%	31%	13%	-
IBEW 8 BR Strategic	_%	15%	10%	3%	1%	_
Income Opp		1370	1070	370	170	-
IBEW 8 Loomis Sayles	_%	_	_	_	_	_
Strategic						
IBEW 8 T. Rowe Price	_%	_	_	_	_	_
Balanced	_/0					
IBEW 8 T. Rowe Price	_%	_	_	_	_	_
Ret 2015	_/*					
IBEW 8 T. Rowe Price	_%	-	_	<u>-</u>	-	-
Ret 2020						
IBEW 8 T. Rowe Price	_%	-	_	-	-	-
Ret 2025						
IBEW 8 T. Rowe Price	_%	-	_	-	-	-
Ret 2030						
IBEW 8 T. Rowe Price	_%	-	-	-	-	-
Ret 2035						
IBEW 8 T. Rowe Price	_%	-	-	_	-	-
Ret 2040	_					
IBEW 8 T. Rowe Price	_%	-	-	-	-	-
Ret 2045	_					
IBEW 8 T. Rowe Price	_%	-	-	-	-	-
Ret 2050	_					
IBEW 8 T. Rowe Price	_%	-	-	-	-	-
Ret 2055			<b>5</b> 0/	1.10/	1.50/	1.00/
IBEW 8 MFS Value IBEW 8 IBEW-NECA	_%	-	5%	11%	15%	16%
	_%	-	10%	18%	26%	34%
Equity Index IBEW 8 AF Growth Fd						
of America	_%	-	5%	12%	15%	17%
IBEW 8 AllianzGI NFJ						
Sm Cap Va	_%	-	2%	4%	5%	6%
IBEW 8 Janus Triton	_%		3%	4%	6%	7%
IBEW 8 Harbor	_70	-	370	470	070	7 70
International	_%	-	5%	11%	17%	20%
IBEW 8 Main Fund	_%	_	_	_	_	_
IBEW 8 Conservative		-	-	-	-	-
Fund	_%	-	-	-	-	-

provided. Make sure selections are whole percentages and total 100%.

# 4. PARTICIPANT SIGNATURE

I certify that the above Rollover Contribution was an eligible rollover distribution from either a 401(a) qualified plan, 403(a) qualified annuity plan, 401(b) tax-sheltered annuity plan, traditional IRA, or 457(b) government plan.



Participant's Signature Date

IMPORTANT NOTE: IF YOU ENROLL BY MAILING THIS FORM TO MASSMUTUAL, BUT THEN SUBSEQUENTLY CHANGE YOUR ELECTIONS THROUGH THE AUTOMATED PHONE LINE OR THE PARTICIPANT WEBSITE, THE MOST RECENTLY DATED ACTIVITY WILL PREVAIL.

If you have selected an investment strategy and one or more of the strategy's component investments listed on your form has been replaced, any contributions that would have been invested in that component investment will be invested according to the investment

 $allocation\ in\ effect\ at\ the\ time\ the\ strategy\ is\ implemented\ and\ the\ new\ component\ will\ be\ listed\ on\ your\ confirmation\ form.$