



Nationwide®

Direct Transfer for Purchase of Permissive Service Credits

Personal Information

Name: _____ Account Number: _____

Street Address: _____

City: _____ State: _____ ZIP: _____

Home Phone: _____ Work Phone: _____

Email: _____

How would you like to be contacted if additional information is required? ☐ Telephone ☐ Email

Plan Transfer From

☐ City of Chicago Deferred Compensation Plan (0035044001)

☐ Cook County Forest Preserve Deferred Comp. Plan (0035043001)

☐ Cook County Employees Deferred Compensation Plan (0035046001)

☐ Other _____

NOTE: In accordance with the provisions of the Economic Growth and Tax Relief Reconciliation Act of 2001, your plan has elected to allow the use of all or a portion of a 457 Deferred Compensation Plan account balance to purchase permissive service credits or for the repayment of service credits to a governmental defined benefit (pension) plan (as defined in IRC Section 414(d)).

Pension Fund Verification

Please consider this as confirmation of the balance due of \$_____ if paid by _____.

Payments made and balances due after this date may accrue additional interest.

Pension Board Authorized Signature: _____ Date _____

(The individual signing this request must be an authorized signer of the appropriate pension board and acknowledges that the pension board, as checked below, will accept this request for the benefit of the participant from a Section 457 Deferred Compensation Plan.) Or you may attach a signed letter from the Pension Board indicating the amount of eligibility.

☐ **County Employees' and Officers' Annuity and Benefit Fund of Cook County**

70 W. Madison St., Suite 1925, Chicago, IL 60602
Phone: 312-603-1200

☐ **Firemen's Annuity and Benefit Fund of Chicago**

20 S. Clark St., Suite 300, Chicago, IL 60603
Phone: 312-726-5823

☐ **Forest Preserve District Employees' Annuity and Benefit Fund of Cook County**

70 W. Madison St., Suite 1925, Chicago, IL 60602
Phone: 312-603-1200

☐ **Illinois Municipal Retirement Fund**

2211 York Road, Suite 500, Oak Brook, IL 60523-2337
Phone: 800-275-4673

☐ **Laborers' and Retirement Board Employees' Annuity and Benefit Fund of Chicago**

150 N. Wacker Dr, Suite 800, Chicago, IL 60606
Phone: 312-236-2065

☐ **Municipal Employees' Annuity and Benefit Fund of Chicago**

321 N. Clark Street, Suite 700, Chicago, IL 60654
Phone: 312-236-4700

☐ **Park Employees' Annuity & Benefit Fund of Chicago**

55 E. Monroe St., Suite 2720, Chicago, IL 60603
Phone: 312-553-9265

☐ **Policemen's Annuity and Benefit Fund of Chicago**

221 N. LaSalle St., Suite 1626, Chicago, IL 60601
Phone: 312-744-3891

☐ **Public School Teachers' Pension & Ret. Fund of Chicago**

203 N. LaSalle St., Suite 2600, Chicago, IL 60601
Phone: 312-641-4464

☐ **State Retirement Systems**

2101 South Veterans Pky, PO Box 19255
Springfield, IL 62794
Phone: 217-785-7444

☐ **State Universities Retirement Systems**

1901 Fox Drive, Champaign, IL 61820
Phone: 800-ASK-SURS (800-275-7877)

☐ _____

Participant understands that to effect this transfer, investment options will be liquidated in the order established by the plan sponsor. **Transfer requests must be authorized by the appropriate pension board and received by Nationwide Retirement Solutions by the 15th of the month to be processed by the end of the month.** The Plan Sponsor and its Third-Party Administrator assumes no responsibility for any investment losses the participant may experience as a result of this transfer or attempt to transfer. By making said transfer on behalf of participant, Plan Sponsor and its Third-Party Administrator make no warranties or representations as to whether any such transfer will be construed as a taxable event or whether receiving plan may lawfully accept such transfers.

Signature: _____ Date: _____