

**457 PLAN TO PLAN TRANSFER REQUEST (outgoing)**

**(all assets will be transferred)**

**The Commonwealth of Virginia Deferred Compensation Plan is an eligible 457(b) Plan under Internal Revenue Code rules.**

<b>PLAN NAME</b>	<b>PLAN NUMBER</b>
<b>COMMONWEALTH OF VIRGINIA DEFERRED COMPENSATION PLAN</b>	<b>98987-01</b>

<b>PARTICIPANT INFORMATION</b>	<b>Must be completed</b>
_____ Last Name / First Name / MI	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Social Security Number
_____ Address - Number & Street	( ) _____ Home Phone
_____ City / State / Zip Code	( ) _____ Work Phone

**IMPORTANT INFORMATION**

**If you have investments in the self-directed brokerage account, you will need to contact CSFBdirect and have all funds transferred to the core investment options (non-self-directed investment options). See the Information section.**

**TRANSFER** **Must be completed**

**ONCE YOUR TRANSFER HAS BEEN PROCESSED, IT CANNOT BE CHANGED.**

**NEW EMPLOYER INFORMATION**

\_\_\_\_\_  
Name of New Employer

\_\_\_\_\_  
Contact Name

\_\_\_\_\_  
Contact Phone Number

The undersigned verifies that the employer's Plan is an eligible 457(b) Plan and agrees to accept the amount remitted as a contribution to the new 457(b) Plan.

\_\_\_\_\_  
**Authorized Plan Administrator/Trustee Signature**  
**For New Employer's Plan** \_\_\_\_\_  
**Date**

**Financial institution check should be payable to:** \_\_\_\_\_

**FINANCIAL INSTITUTION MAILING INSTRUCTIONS**

<b>MAILING ADDRESS:</b>	<b>NEW ACCOUNT INFORMATION:</b>
_____ Name of Financial Institution	_____ Account Number (if available)
_____ Address - Number & Street	_____ Name on Account
_____ City / State / Zip Code	

**Participant forward to:**  
Great - West/BenefitsCorp  
1108 East Main St.  
Richmond, VA 23219

**Phone#: 1-866-226-6682**

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**INFORMATION**

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**INCOMPLETE OR INACCURATE INFORMATION** – In the event any section of this form is incomplete or inaccurate, the transaction requested on this form may not be processed and you may be required to complete a new form or provide additional information before the distribution can be processed.

**THE COMMONWEALTH OF VIRGINIA DEFERRED COMPENSATION PLAN** is an eligible 457(b) Plan under IRC (“Internal Revenue Code”) rules.

**CHANGES TO THIS REQUEST** – If you need to cross out any information, you **MUST** initial the change to validate the change or the request may be returned for verification.

**SELF-DIRECTED BROKERAGE (SDB) ACCOUNT NOTICE** – If you have the self-directed brokerage account, it is your responsibility to contact CSFB*direct* to transfer the SDB funds to the core investments (non-self-directed brokerage investments). Great-West/BenefitsCorp will only transfer funds held in the core investments to the new employer per this request. It is recommended that your CSFB*direct* account be completely closed before forwarding this form to Great-West/BenefitsCorp for processing.

If monies remain in your SDB account at the time the request for payment is received, we will distribute the amount in the core investments immediately and then request that the SDB account be liquidated and transferred into the core investments in accordance with your Plan’s contract or Letter of Instruction. The transfer will take 2–3 business days. Once transferred into the core investments, the remaining funds will be distributed within 2–3 business days.

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**REQUIRED SIGNATURES**

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**Must be completed**

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**IMPORTANT NOTE:** Any person who knowingly presents a false or fraudulent claim is subject to criminal and civil penalties.

My signature acknowledges that I have read, understand and agree to all pages of this Plan to Plan Transfer Request form, and affirm that all information that I have provided is true and correct. I understand that it is entirely my responsibility to ensure that this election conforms with all applicable provisions of the IRC.

\_\_\_\_\_  
**Participant Signature**\_\_\_\_\_  
**Date**

**DO NOT COMPLETE – Great-West/BenefitsCorp will obtain proper VRS signature.**

\_\_\_\_\_  
Employee Name (please print)\_\_\_\_\_  
Date of Separation from Service

I certify that the above-stated date of separation from service is accurate.

\_\_\_\_\_  
Signature of Authorized VRS Representative\_\_\_\_\_  
Date Signed