

## **ROLLOVER CONTRIBUTION INSTRUCTIONS**

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### **A. General Information:**

Many other types of retirement accounts are eligible to be rolled over into your current employer's plan. You may be eligible to rollover balances from a previous employer plan or certain other retirement accounts. Your current plan will accept a participant rollover contribution and/or direct rollovers of distributions of pre-tax accounts from the following types of eligible plans:

- 401(a) qualified plan (including 401(k) plan) and 403(a) qualified annuity
- 403(b) tax sheltered annuity plan
- 457(b) State and local government deferred compensation plan
- Individual Retirement Accounts (excluding Roth or Education IRAs)

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### **B. Instructions:**

Once you have determined that your account is one of the allowable types, follow the instructions below to complete your rollover contribution.

1. Contact the recordkeeper or custodian of the account to be rolled over. Typically, you will need to complete a distribution form indicating your election to rollover your account. This form should contain a section in which you will provide the rollover instructions.
2. Instruct them to make the check payable as follows:

**Benefit Trust Company**  
**FBO: [participant's name]**

3. Instruct them to mail the check as follows:

**American Northwest Retirement Plan Services**  
**PO Box 24838**  
**Federal Way, WA 98093**

4. If you have not provided American Northwest with your beneficiary designation, please complete sections A. and C. of the Enrollment Form (available on the website) and return it to our office.
5. If you have not provided American Northwest with your investment selections, please complete the Investment Selection Form (available on the website) and return it to our office.
6. Once your rollover check has been received in our office and processed, you will be sent a notification via mail confirming that your rollover contribution is complete.

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### **C. Contact Us:**

Please contact American Northwest with any additional questions.

**Toll Free:** 888-345-3684  
**Email:** [planadmin@americannw.com](mailto:planadmin@americannw.com)