

Incoming Assets Form

Personal Information		
Employer Name:	Employer Number:	
Name:	Social Security Number:	
Address:	City, State, & Zip Code:	
Date of Birth:	Home Phone Number:	
Department:	Work Phone Number:	
Date of Hire	Gender: Male Female	
Email Address:		
Rollover/Transfer Funds From		
401(a) Drop 403(b) Governmental 457 Ro	th Governmental 457	
Carrier/Custodian Name:	Account Number:	
Address:	Contact Name:	
City, State, & Zip Code:	Contact Phone Number:	
Rollover/Transfer Funds To		
Plan Type: 457 401(a) 401(k) Deemed Roth IR	A ☐ Roth 457 ☐ Roth 401(k)	
Make check payable to: Nationwide FBO (Participant Name, SS#, Acct#	Amount to Rollover/Transfe Partial Dollar Amount \$_ Total Account Balance	er:
Mail check to: Nationwide Retirement Solutions PO Box 183150 Columbus, OH 43218		
457 to 457 Incoming Assets Some 457(b) Plan documents allow participants who leave option to TRANSFER or ROLLOVER the assets from the firs when the assets are available for distribution from your NRS I have severed from employment from my previous employed. The difference between a transfer and rollover: • Following a Transfer, withdrawal of assets is permitted only (e.g. Severance of employment or age 70 ½.)	t employer. The choice of transfer or rol account. r on(date). y when the account holder experiences a	lover will determine a distributable event.
• Following a Rollover, withdrawal of assets is permitted at a		s request.
Please make your selection: ☐ TRANSFER ☐ ROLLOVE	3	
Investment Direction to Nationwide		
☐ Credit my rollover/transfer according to the current allocation on file	OR Credit my rollover/transfer a	as listed below:
*If you do not indicate your allocation choices, your rollover will be credited to your current allocation.	Investment Option	Percent
*Additionally, if you select an investment option that is closed, your rollover/transfer will be credited to the Nationwide Money Market Fund.	M	1ust total 100%
Authorization		
I acknowledge that I have received and read the fund prosp understand that my rollover will become subject to the term butions will be withdrawn on a pro-rated basis across all acc requirements for making a pre-tax rollover/transfer into an e entitled to rely fully on my certification. I expressly assume transfer, and I agree that Nationwide shall not be responsible	is and conditions of the plan. I understa counts within the plan selected. I certify eligible retirement plan. Nationwide Reti responsibility for tax consequences rela-	nd that all distri- that I satisfy the rement Solutions is
Upon receipt, I hereby request my funds to be invested as d may impose a short-term trade fee. Please read the underly		ome mutual funds
Nationwide Retirement Solutions hereby agrees to accept the deposit the proceeds within 5 business days in the account	established on behalf of the individual's	
Important: Please liquidate and transfer all securities nece	ssary to complete this transaction.	
Participant Signature:	Dat	e:
Retirement Specialist Name (Print):	Dat	e:
I and the second	· · · · · · · · · · · · · · · · · · ·	

Original - Nationwide

DC-4261 (07/2015)

Copy - Account Holder

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Medallion Signature Guarantee Stamp Here