MUST BE PRINTED ON COMPANY LETTERHEAD

Letter of Acceptance for Direct Rollover to a Qualified Retirement Plan

Please return this Letter of Acceptance with a completed IRA Distribution Request Form. This document must be printed on company letterhead in order to complete processing.

If funds are going to a Traditional, Rollover or Roth IRA this is not considered a direct rollover and this form should not be used.

Participant Name	_____
Indicate Type of Rollover	☐ 401a ☐ 401k ☐ 403b ☐ Profit Sharing (PSP)
Account Number Funds are Transferring To	_____
Payment Instructions	Make check payable to: _____ _____ Mail check to: _____ _____ _____
Acceptance of Funds	_____ (Successor Custodian Name), hereby agrees to accept funds from the current custodian, Pershing LLC and deposit them into a qualified retirement plan on behalf of the participant identified above in accordance with the applicable provisions of the Internal Revenue Service Code.
Authorized Signature	_____ _____ Plan Administrator Signature Date _____ Title

Return to: Hewitt Financial Services
PO Box 563901
Charlotte, NC 28256-3901
Fax: 1.847.554.1444