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Kirby Nagelhout Construction Company 401(k) Plan

ROLLOVER INSTRUCTIONS

Rollover from a Qualified Employer Plan

Are you interested in rolling over your funds from your former employer into your current plan? Please follow these easy steps to initiate this process:

- Contact your former employer or former plan administrator. They should provide you a distribution form or packet. You may have been provided a distribution packet when you left your job.
- Within this packet, there should be a place to indicate what you would like to do with your retirement funds. For example, you might be asked if you would like to take a lump sum distribution or roll your funds into another qualified retirement plan. Choose the option to roll your funds into another qualified retirement plan.
- The form should ask you where to mail your rollover check and how to have the check issued. Please use the following information on your distribution forms:

Make Rollover Check Payable to:

(D) Schwab CSTB, FBO: Kirby Nagelhout Construction Company 401(k) Plan; 106014

Write In the Memo Line of the Rollover Check:

Acct # 106014 **fbo**: *Participant Name and SSN*

Mail the Rollover Check to:
Charles Schwab Trust Bank
Attn: RBS Cash Management
PO Box 81686
Austin, TX 78708

Overnight Address:
Charles Schwab Trust Bank
Attn: Trust Services
2309 Gracy Farms Ln
Austin, TX 78758

- Return the completed distribution form to your prior employer/plan administrator and they should initiate the rollover.
- Complete the second page of this Rollover Instruction Form and return it to Randall & Hurley at submit@randall-hurley.com.

Rollover from Traditional (non-Roth) or Conduit IRA

Please follow these easy steps to initiate a transfer from an Individual Retirement Account (IRA). ***Note: Roth IRAs cannot be rolled into this Plan.*.**

Complete the second page of this Rollover Instruction Form and provide to the current custodian of your IRA (shown on your statement). They might require additional paperwork for the rollover but this form will get things started and let them know where to send the check.

Kirby Nagelhout Construction Company 401(k) Plan

ROLLOVER INSTRUCTIONS FORM

Name: Brett Sonflieth SSN: 543-47-4006

Address: 15654 SE Thiessen CT Milwaukie, OR 97267

I wish to make a rollover contribution in the following amount(s):

☐ Pre-tax Rollover:
I certify that this is a pre-tax Rollover from a qualified plan, 403(b) plan, 457(b) plan, or a traditional or conduit IRA.
The total pre-tax rollover amount is: $______________________.

☐ After-tax Roth Rollover (*if allowed by plan*):
I certify that this rollover is from an after-tax Roth qualified plan, 403(b) plan, or 457(b) plan.
The total Roth rollover amount is: $________________________.

$__________________________________ Amount ($) of Roth Contributions/Basis

______________________________ Year of Initial Roth Contribution

In order to initiate a direct rollover to this plan, I have provided my prior administrator and/or IRA custodian with the information on Page 1 of this form.

I understand that my balance will be allocated according to my current elections in this Plan. If I do not have a current election on file, the amount will be invested into the default investment.

______________________________ *Participant Signature (required)*

______________________________ *Date (required)*

Action by Administrative Committee:

Approved________ Disapproved________

Explanation: ____

____

______________________________ *Administrative Committee*

______________________________ *Date*

Please return a copy of this completed form to Randall & Hurley at submit@randall-hurley.com.