

## HRSA-ILA Annuity & Savings Plan Rollover Statement

Account: **SF 51506 - 1 - 1 - 1**

Name: \_\_\_\_\_  
first middle last

Address: \_\_\_\_\_  
street

\_\_\_\_\_ city state zip

Social Security No. \_\_\_\_\_

Birth Date: \_\_\_\_\_ Hire Date: \_\_\_\_\_

Marital Status:     Married     Single or Legally Separated     Divorced

### ROLLOVER INFORMATION

Amount of Rollover Contribution: Taxable portion (include investment income) \$ \_\_\_\_\_

Nontaxable (e.g., participant after-tax contributions) \$ \_\_\_\_\_

Total Rollover Contribution \$ \_\_\_\_\_

*[Note: Rollovers cannot include required minimum distributions. Participant after-tax contributions can only be included in a direct rollover from a qualified plan.]*

Payment:     Check attached made payable to MassMutual. Include the employee's social security number and the new plan's account number on the check.

Wire or Check sent separately to MassMutual Retirement Services by the Prior Plan.  
*[Provide a completed Direct Rollover Request form to your Prior Plan Administrator for wiring or mailing instructions.]*

### INVESTMENT SELECTION

For more complete information about each investment, including charges and expenses, we recommend that you read each investment's prospectus carefully before investing. You can read and print copies for all of your plan's investment options through The Journey<sup>SM</sup> web site at [www.massmutual.com/retire](http://www.massmutual.com/retire). You also may contact our Participant Information Center at 1-800-743-5274 between 8:00 a.m. and 8:00 p.m. ET, Monday through Friday, to request a prospectus.

The Rollover Contributions will be invested in a separate manner from other contributions to the Plan. Please enter your investment selection below.

**(ENTER WHOLE PERCENTAGES; 1% MINIMUM IN INVESTMENTS SELECTED; MULTIPLES OF 1% THEREAFTER)**

SF Guaranteed _____%	MM S&P 500 Index Fund (Nrtn Trust) _____%
Prm Core Bond (Barings) _____%	Sel Blue Chip Growth (T. Rowe Price) _____%
RetireSMART Conservative _____%	Sel Gr Opps (Sands/JSP) _____%
RetireSMART Moderate _____%	Prm OppenheimFds Sm Cp Opp II Sel _____%
RetireSMART Moderate Growth _____%	Sel Wellington/OFI SmCpGr _____%
RetireSMART Growth _____%	Sel Equity Opportunities Fund (TRP/Well) _____%
Sel Black Rock (Global Allocation II) _____%	Sel Mid Cap Growth Fund (TRP/Frontier) _____%
Sel Div Value Fund (Huber/BwHnly) _____%	Premier Global (OFI) _____%
Small Cap Value (Invesco) _____%	MMI EAFE Index (Nrtn Trust) _____%

**(TOTAL PERCENTAGES MUST EQUAL 100 %)**

### SIGNATURES

*I certify that the above Rollover Contribution was an eligible rollover distribution from either a 401(a) qualified plan, 403(a) qualified annuity plan, 403(b) tax-sheltered annuity plan, traditional IRA, or 457(b) governmental plan.*

\_\_\_\_\_  
Participant \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date

I, the plan administrator, certify the above information is correct.

\_\_\_\_\_  
Plan Administrator \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date