TEXAS TECH UNIVERSITY SYSTEM

ORP/TSA
Transfer Request

PARTICIPANT

_____ _____
Name of Participant (please print) Social Security Number

I hereby authorize a: Full Transfer of ORP ____ and/or TSA ____ account(s)*
Partial Transfer of ORP ____ and/or TSA ____ account(s)

For partial transfers, indicate dollar amount or percentage of total to be transferred: _____

* Please note: The surrendering company will close your account based on your request for a full transfer; therefore, the ORP Salary Reduction Acknowledgment/Change of Company Form and/or TSA Salary Reduction Agreement must be completed in order to direct future payroll contributions to the new/receiving company.

_____ _____
Participant's Signature Date

RECEIVING COMPANY

_____
Company Name (please print)

_____
Mailing Address

According to IRS Ruling 90-24, transfers must be (1) direct and (2) the transferred funds must continue to be subject to the same or more stringent early distribution rules.

According to TTUS ORP/TSA policies (1) it is the receiving company's responsibility when accepting ORP funds to identify the amount of those funds contributed by the employee on an after-tax basis and to establish records which accurately track and report those funds to the employee upon retirement or withdrawal, and (2) in the event benefits are made available to the employee without proper authorization from TTUS, the company will be required to redeposit the funds to the employee's account as if no withdrawal had been made.

I certify that this transfer will be processed in accordance with these regulations.

_____ _____
Signature of Company Representative Date

SURRENDERING COMPANY

_____ _____
Company Name Account #

TO BE COMPLETED BY TTUS

TTUS hereby authorizes the above transfer in accordance with TTUS policies, Coordinating Board Rules and Regulations, and Federal laws.

This employee account is ____ Vested ____ Not Vested

_____ _____
Signature of Personnel/Human Resources Representative Date

_____ _____
Signature of Payroll Representative Date