

SERVANT SOLUTIONS
a Safe Harbor Plan since January 2026
13300 Olivo Road, Fishers, IN 46037 • (765) 642-3880 • (800) 844-8983

DIRECT ROLLOVER REQUEST

TO: Distributing Plan Name
(Company currently holding your account)

RE: _____ **Acct. No.** _____

Participant's (Account Owner) Name [Please Print] Plan type: IRA, 401(k), 403(b), etc.

Address _____

City _____ State _____ Zip Code _____

Plan was maintained by church employer:
☐ Yes ☐ No

I have elected to transfer, as a Direct Rollover, the full or partial value of the account referenced above to the Servant Solutions Retirement Plan ("Plan"), a Safe Harbor church retirement income account described under section 403(b)(9) of the Internal Revenue Code ("Code"), which is maintained by Servant Solutions, Inc. Instructions are as follows:

[Insert only one figure: dollar amount or percent]

- (1) Process a distribution of \$ _____ or _____ %, of my contract or account, as a Direct Rollover. Please liquidate all or any portion of the investments and assets, of the referenced account, necessary to process a distribution for the stated amount.

Note: The Plan will not accept any ROTH IRA rollover contributions.

- (2) Include my Social Security number and account number 450815 on the check stub and mail to:
Servant Solutions, Inc.

FBO: _____

[Print Participant's Name]

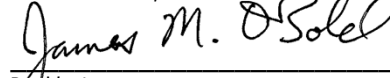
13300 Olivo Road
Fishers, IN 46037

Participant's signature

Date

The Servant Solutions Retirement Plan is an "eligible retirement plan", as defined under Code section 402(c)(8)(B) and, subject to the eligible employer plans and exceptions described in the NOTICE below, the Plan will accept this Direct Rollover.

Servant Solutions, Inc.



President

Date

NOTICES

Rollover funds received into the Servant Solutions Retirement Plan will be invested based on the participant's current investment election. If there is no current investment election on file, the funds will be directed to the Plan's investment default option.

Payments that can and cannot be rolled over to the Servant Solutions Retirement Plan:

Only payments from an "eligible employer plan" can be rolled over to the Servant Solutions Retirement Plan. An "eligible employer plan" includes a plan qualified under section 401(a) of the Internal Revenue Code, including a 401(k) plan, profit-sharing plan, defined benefit plan, stock bonus plan, and money purchase plan; a section 403(a) annuity plan; a section 403(b) tax sheltered annuity; and an eligible section 457(b) plan maintained by a governmental employer (governmental 457 plan). Also, a traditional IRA can be rolled over to Servant Solutions. Payments that *cannot* be rolled over to Servant Solutions include payments from a Roth IRA or a Coverdell Education Savings Account.

Email or upload to Distributing Company and to Servant Solutions.