



701 Camino de Los Marquez Santa Fe, NM 87502 (505) 827-8030 (505) 827-1855 fax
6201 Uptown Blvd. NE Ste 204 Albuquerque, NM 87110 (505) 888-1560 (505) 830-2976 fax

Direct Rollover to NMERB Transfer Request Form

This form is used for purposes of purchasing earned service credit and allowed service credit.

The NM Educational Retirement Board (NMERB) is a qualified plan under section 401 (a) of the Internal Revenue Service Code. In accordance with the provisions of the Economic Growth and Tax Relief Reconciliation Act of 2001, effective January 1, 2002, NMERB will accept a direct rollover of funds from the following sources:

- Eligible Deferred Compensation IRC 457 (maintained by a governmental employer only)
- Another Qualified Employer Plan IRC 401(a) (including 401(k))
- Tax Sheltered Annuity (TSA) IRC 403(b)
- Individual Retirement Account (IRA) IRC 408 (certain restrictions apply)

Please note that the NMERB will only accept a rollover of pre-taxed monies.

Both the member and the custodian/trustee must complete this form. Upon NMERB's receipt of this completed form and rollover check from the custodian/trustee, the member will be notified accordingly.

Section I: To be completed by the member

I request a transfer of my funds in the amount of \$_____ to the NM Educational Retirement Board under the terms and regulations of Section 402 and other applicable provisions of the Internal Revenue Code.

Member's Name

Address

City

State

Zip

Social Security Number

Telephone Number

Member's Signature

Date

Section II: To be completed by custodian/trustee

This request is approved and funds will be transferred as a tax-free exchange under Section 402 and other applicable provisions of the Internal Revenue Code.

Custodian/Trustee Name

Telephone Number

Mailing Address

City

State

Zip

Account Number

Plan Type (ie: 401(a), 457, etc)

Representative Name and Title

Date

The custodian/trustee shall mail this completed form and a check issued as requested to:
 NM Educational Retirement Board *toll free number: 1-866-691-2345*
 PO Box 26129 *website: www.nmerb.org*
 Santa Fe, NM 87502-0129