

New Mexico Educational Retirement Board
701 Camino de los Marquez P.O. Box 26129
Santa Fe, NM 87502-0129
(505) 827-8030 FAX (505) 827-1855

**DIRECT ROLLOVER TO ERB
TRANSFER REQUEST FORM**

(For purposes of purchasing earned service credit and allowed service credit)

Please print in Black Ink

The New Mexico Educational Retirement Board (ERB) 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, ERB will accept a direct rollover of funds from the following sources:

- Eligible Deferred Compensation I.R.C. 457 (maintained by a governmental employer only)
- Another Qualified Employer Plan I.R.C. 401(a) (including 401 (k))
- Tax Sheltered Annuity (T.S.A.) I.R.C. 403(b)
- Individual Retirement Account (I.R.A.) I.R.C. 408 (certain restrictions apply)

Note: the ERB will only accept a rollover of pre-tax monies.

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

SECTION A: TO BE COMPLETED BY THE MEMBER

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

Member's Name	Telephone Number ()
Street Address or P.O. Box	Social Security Number
City State Zip Code	
Member's Signature	Date Signed

SECTION B: TO BE COMPLETED BY CUSTODIAN/TRUSTEE

We approve of this request and will transfer the funds as a tax-free exchange under section 402 and other applicable provisions of the Internal Revenue Code.

Custodian/Trustee Name	Telephone Number ()
Mailing Address	Account Number
City State Zip Code	Plan Type [e.g. 401(a), 457, etc]
Representative Name and Title	Date Signed

**Custodian Trustee should mail this completed form and a check issued as requested to:
New Mexico Educational Retirement Board
P.O. Box 26129
Santa Fe, NM 87502-0129**