

The Rabbis and Cantors Retirement Plan

Rollover Documentation

A transfer of funds from an existing qualified retirement fund to an account, as part of The Rabbis and Cantors Retirement Plan is a transaction known as a “rollover.” For each intended rollover the participant must complete the appropriate rollover form, as well as submit the following form. If a participant wishes to engage in more than one rollover transaction, the participant must complete this form separately for each transaction.

Participant’s name and address: _____

Employer at the time the funds were invested in the existing retirement fund:

Name and address of employer _____

Dates of employment: _____

Type of employer: _____

Participant’s title or role at the time the funds were earned (e.g., rabbi, cantor, education director, chaplain) _____

Identity of institution where the funds are held before the rollover:

Name and address: _____

Account number: _____

Approximate amount being rolled over: \$_____.

I, the participant, certify that:

- a. The funds being transferred to the Rabbis and Cantors Retirement Plan were contributed to the current retirement plan after I was ordained as a Rabbi, or invested as a Cantor, and while I was working in a role for which I was exercising my ministry as a Jewish clergy.
- b. To the best of my knowledge, this information is accurate.

I acknowledge that (a) I have not received any legal or tax advice from the Rabbis and Cantors Retirement Board, Inc., and (b) I have relied to the extent I desire on legal or tax advice of my own advisors.

Signed _____ Date _____