

Inbound Rollover

Use this form to roll over money from a former employer-sponsored plan or Traditional IRA to your employer-sponsored plan at GuideStone®.

Application for Rollover into Retirement Plan

Use a separate form for each distribution eligible for rollover.

For assistance, please call **1-888-98-GUIDE** (1-888-984-8433).

Return the completed form to:

Retirement Operations
GuideStone
5005 LBJ Freeway, Suite 2200
Dallas, TX 75244-6152

Mail check overnight or First-Class Mail® to:

Finance and Accounting
GuideStone
FBO participant name
5005 LBJ Freeway, Suite 2200
Dallas, TX 75244-6152

1. PARTICIPANT INFORMATION (THIS FORM MUST BE TYPED OR COMPLETED IN INK.)

Participant name: _____ Social Security number (last four digits): _____

Home address: _____

City: _____ State: _____ ZIP Code: _____

Birth date: ____/____/____ Marital status: Married Single

Daytime telephone: (____) _____ Email address: _____

Employer name: _____

Place rollover in the following employer plan with GuideStone: _____

2. ROLLOVER INFORMATION (THE INFORMATION BELOW IS REQUIRED TO PROCESS YOUR ELIGIBLE ROLLOVER DISTRIBUTION.)

Only eligible amounts may be rolled over, thereby avoiding current taxation.

A. Check the box that indicates the type of plan the rollover was distributed from:

- A distribution or direct rollover from an Individual Retirement Account or Annuity (IRA) described in Code Section 408(a) or 408(b)
- Other eligible retirement plan (example: 401(k) or 403(b) plan) _____
- A distribution made payable to you (indirect rollover)

B. Account to be rolled over to GuideStone (Indicate the name, address and telephone number of the distributing plan.):

Current custodian: _____ Telephone number: (____) _____

Address: _____

City: _____ State: _____ ZIP Code: _____

Custodian fax number: (____) _____

Please liquidate and roll over the following investments to GuideStone. (Contact the distributing plan for information as to whether 100% of your distribution is eligible for rollover.):

Account number: _____ Fund name: _____ Entire account Partial _____ \$ or %

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Account number: _____ Fund name: _____ Entire account Partial _____ \$ or %

Account number: _____ Fund name: _____ Entire account Partial _____ \$ or %

For IRA Certificates of Deposit: Immediately or Upon maturity – maturity date: ____/____/____

If your CD is to be rolled over upon maturity, we must receive this form at least 30 days, but not more than 60 days, prior to the maturity date. If the maturity date is more than 60 days away, the rollover form will be returned to you. Your current IRA custodian may impose a premature withdrawal penalty if you choose to liquidate your CD prior to maturity. If you are rolling over more than one CD and the maturity dates are more than one month apart, please complete separate forms.

Continued on next page



2. ROLLOVER INFORMATION (CONTINUED)

C. Participants with 403(b) plan rollover funds only: Is the rollover amount attributable to church-related service? Yes No

If "Yes," \$ _____ of the rollover is attributable to salary reduction contributions to a retirement plan administered by a church-related employer (do not include earnings in the total). If no amount is provided, the total rollover amount will be included as prior salary reduction contributions for the purpose of calculating contribution limits under Code Section 402(g).

Denominational affiliation: _____

D. The rollover amount represents \$ _____ in tax-paid contributions and \$ _____ in tax-paid earnings from an eligible retirement plan as described in Code Section 401(a) or 403(b). **The rollover amount does not include non-deductible contributions to an IRA.** (Note: Tax-paid rollovers must be a direct rollover from the distributing plan.)

E. The rollover amount represents \$ _____ in Roth elective deferral contributions and \$ _____ in Roth elective deferral earnings from an eligible retirement plan as described in Code Section 401(a) or 403(b). (Note: Roth elective deferral rollovers must be a direct rollover from the distributing plan.)

Tax year in which the first Roth elective deferral was contributed: _____

3. INVESTMENT ALLOCATION

Please indicate how you wish to allocate your rollover into the available investment funds. The accumulations will remain in the fund(s) until you change your election by visiting your MyGuideStone® account or contacting GuideStone directly.

OPTION 1 – DEFAULT ALLOCATION (NOT APPLICABLE IF YOU COMPLETED OPTION 2.)

If you do not complete Option 2 below:

- If you are currently contributing, your rollover will be invested into the same funds as your future contributions will be allocated.
- If you are not actively contributing, your rollover will be placed according to your most recent contribution allocation on file. However, if you do not have a contribution allocation on file, your rollover will be placed in your plan's default investment.

OPTION 2 – FUND SELECTION (ONLY APPLICABLE IF YOU COMPLETED THE INFORMATION BELOW IN OPTION 2.)

To choose specific investment funds under your employer's plan into which your rollover will be deposited, please indicate your choice of investment fund(s) below. At a later date, you may request a fund exchange through your MyGuideStone account.

Investment fund: _____ Percentage: _____ %

Investment fund: _____ Percentage: _____ %

Investment fund: _____ Percentage: _____ %

Investment fund: _____ Percentage: _____ %

Total must equal 100%: _____ %

Please write in the space below for more than four fund choices.

You may elect to change your investment fund at any time through your MyGuideStone account or by contacting GuideStone directly.

Participants are prohibited from exchanging out of the Capital Preservation Fund to a "competing fund" without first investing in a "non-competing fund" for a period of at least 90 days. Also, simultaneous exchanges are not allowed. For more complete information, visit GuideStone.org or call **1-888-98-GUIDE** (1-888-984-8433).

4. PARTICIPANT SIGNATURE AND CERTIFICATION (YOU MUST SIGN AND DATE THE APPLICATION, OR THE FORM WILL BE RETURNED TO YOU.)

I authorize the rollover of funds to GuideStone. I understand that if I am RMD age or older or will attain RMD age in this calendar year, I must satisfy any minimum distribution requirements prior to a direct rollover.

I certify that:

- The rollover is attributable to an eligible rollover distribution or direct rollover from an eligible retirement plan as described in Code Section 402(c)(8)(B).
- The rollover does not include any non-deductible contributions.
- The rollover is not an RMD or hardship distribution.
- If the rollover is not a direct rollover, the distribution is remitted to GuideStone within 60 days after distribution from the eligible retirement plan.
- The information provided in D and E is accurate. I understand that the characterization of the rollover amounts cannot be changed at a later date. I understand that:
 - Any portion of this rollover that is not attributable to ministerial compensation is not eligible for designation as minister’s housing allowance upon withdrawal.
 - I am responsible for keeping information about whether all or any portion of this rollover and related earnings are eligible for minister’s housing allowance.
 - GuideStone will not have any information about the eligibility of this rollover, with earnings, for minister’s housing allowance.
 - I am responsible for determining my eligibility for minister’s housing allowance at retirement.
- I am responsible for any tax consequences arising from this transaction and for any fees imposed by the distributing institution.
- If applicable, I am responsible to confirm that the receiving plan accepts Roth 403(b) funds.
- My signature below authorizes the current custodian of these funds to release any and all information regarding my account to GuideStone in any form GuideStone may request.

Medallion signature guarantee: Not required by GuideStone, but might be by the distributing plan. Please call the custodian or the distributing plan to see if a signature guarantee or other documentation is required.

Medallion signature guarantee — medallion stamp*: _____

*The medallion signature guarantee may be executed by banks, broker-dealers, credit unions, national securities exchanges and savings associations which participate in STAMP, SEMP or NYSE-MSP. A notary public is not a substitute for a signature guarantee. The medallion signature guarantee stamp must include the words “**Signature Guaranteed, Medallion Guaranteed**” and otherwise comply with the medallion program requirements. Please check your fund prospectus or with your fund advisor as to whether a signature guarantee is required.

GuideStone does not recommend rollovers or transfers of assets in employer-sponsored retirement plans or Individual Retirement Accounts (IRAs), except when done so expressly in writing. By signing below, I hereby acknowledge that, unless I have received a recommendation in writing to the contrary, GuideStone has not acted as a fiduciary and has not provided me with investment advice in connection with this rollover or transfer.

Participant signature: _____ Date: ____/____/____

TO BE COMPLETED BY GUIDESTONE AS CUSTODIAN

GuideStone will accept a direct rollover from an eligible retirement plan as authorized under Code Section 402(c)(8) for your benefit. The direct rollover amount will be credited to your retirement income account at GuideStone governed under Section 403(b)(9) or Section 401(a) of the *Internal Revenue Code*.

Signature of GuideStone authorized representative: _____ Date: ____/____/____