

457(b) Deferred Compensation Plan

Application for Transfer to Guidestone Financial Resources

1. PARTICIPANT INFORMATION

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

Home address: _____

City: _____ State: _____ ZIP code: _____

Daytime telephone: (_____) _____ Birth date: ____/____/____ Marital status: Married Single

Email: _____

2. AMOUNTS TO BE TRANSFERRED

A. Transferring eligible 457(b) plan of a tax-exempt organization: _____

Address: _____ City: _____ State: _____ ZIP code: _____

B. Total amount to be transferred: \$ _____

3. PLAN INVESTMENT INFORMATION

Your transfer will be placed in the current plan contribution allocation election on file. If you do not have an election on file, 100% of the transfer will be placed in a designated default fund until you change the election.

4. PARTICIPANT CERTIFICATION

- I certify that the transfer is attributable to an eligible 457(b) deferred compensation plan of a tax-exempt organization.
- I certify that the amounts transferred are cash only and are not in the form of securities, stock or other negotiable instruments of investment, real estate, collectibles or any other form of investment.
- I understand that it is my responsibility to arrange to have the funds sent to Guidestone Financial Resources.
- I certify that Guidestone Financial Resources is entitled to rely on the representations indicated on this form and is hereby released from any liability or responsibility regarding the accuracy of such representations.
- I understand that I am responsible for any tax consequences arising from this transfer.

Participant signature: _____ Date: ____/____/____

5. CERTIFICATION BY TRANSFERRING 457(B) EMPLOYER

Note to transferring employer: This 457(b) Deferred Compensation Plan is an eligible 457 plan of a tax-exempt organization within the meaning of Internal Revenue Code Section 457(b) and the Plan contains a provision permitting the acceptance of plan-to-plan transfers as described in Internal Revenue Code Section 457(e)(10).

Transferring employer:

- I certify that the transfer is attributable to an eligible 457(b) deferred compensation plan of a tax-exempt organization, and that the plan allows for a plan-to-plan transfer to another 457(b) plan of a tax-exempt organization.
- I certify that the participant in Section 1 above (if applicable) has elected the following delayed payment date and payment method, under the terms of the plan:

Payment effective date: ____/____/____ Payment method (if previously elected): _____

- I certify that the amounts transferred are cash only and are not in the form of real estate, collectibles, securities, stock or other negotiable instruments of investment.

Authorized signature: _____ Date: ____/____/____

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Instructions for Application for Transfer to GuideStone Financial Resources

Use of form

Use this form only if you wish to execute a plan-to-plan transfer from an eligible 457(b) deferred compensation plan of a tax-exempt organization into your 457(b) Deferred Compensation Plan invested through GuideStone Financial Resources.

General directions for completing form

- This form must be typed or completed in ink. If you make any changes to your written information, initial the changes.
- You may want to contact a tax adviser before requesting a transfer.
- If you fail to sign your name in Section 4, this application will be returned to you. If the transferring institution fails to sign in Section 5, this application will be returned to you.
- Return the completed form with the transfer check to: Finance and Accounting, GuideStone Financial Resources, 5005 LBJ Freeway, Ste. 2200, Dallas, TX 75244-6152.
- Keep a copy of the completed form for your records.
- Do not request a transfer from your current 457(b) plan until you and your employer have completed the enrollment process for the 457(b) Deferred Compensation Plan. Call GuideStone Financial Resources immediately for the necessary enrollment forms.
- If you have questions about completing this form, call GuideStone Financial Resources toll free at **1-888-98-GUIDE** (1-888-984-8433).

Instructions for completing each box of the *Application for Transfer to GuideStone Financial Resources*

Section 1 – Participant information: List your full legal name and other information as indicated.

Section 2 – Amounts to be transferred:

Box A: Indicate the name and address of the transferring institution.

Box B: Indicate the total amount of the transfer into the Plan.

Section 3 – Plan investment information: Your transfer will be placed in the current 457(b) contribution allocation election on file. If you do not have an election on file, 100% of the transfer will be placed in a designated default fund until you change the election. You may change your investment election by calling GuideStone toll free at **1-888-98-GUIDE** (1-888-984-8433), or by visiting GuideStone's website at *GuideStone.org*.

Section 4 – Participant certification: You **must sign and date** the application or the form will be returned to you. Carefully review the certification statements. Your signature indicates that GuideStone Financial Resources may rely on the information provided on this form.

Section 5 – Certification by transferring employer: The former employer must verify the payment time and form that you selected upon separation from service. The transferring employer **must sign and date** the application or the form will be returned to you.