



**City of West Palm Beach Police Pension Fund**  
**AGREEMENT OF RECEIVING TRUSTEE OR PLAN**

**PLEASE PRINT NAME HERE:** \_\_\_\_\_

**Note to Member: This page is to be completed if option B or C was selected on page one.**

In accordance with the authorization on page one; we agree to deposit the forthcoming rollover amount from the *City of West Palm Beach Police Pension Fund* into the following plan or account:

Type of Plan or Account receiving rollover (check one):

**(Active Members MUST elect DROP OR SHARE OPTION ONLY)**

\_\_\_\_\_ My Existing DROP Account.

\_\_\_\_\_ My Existing SHARE Account.

\* \_\_\_\_\_ 401(a) - 401(k), profit-sharing plan, defined benefit plan, money purchase plan, other "eligible employer plan".

\_\_\_\_\_ 403(a) - annuity plan.

\_\_\_\_\_ 403(b) - tax-sheltered annuity.

\_\_\_\_\_ 457(b) - eligible deferred compensation plan maintained by government employer.

\_\_\_\_\_ 408(a) - Traditional IRA (not Roth IRA, Simple IRA or a Coverdell Education Savings Account).

\* *If rollover includes after-tax contributions to a 401(a) eligible employer plan, the receiving 401(a) plan hereby agrees to accept such rollovers and agrees to separately account for such amounts rolled over including separate accounting for the after-tax employee contributions and earnings on these contributions.*

\_\_\_\_\_  
Print Name and Title of Authorized Representative

\_\_\_\_\_  
Authorized Representative Signature

\_\_\_\_\_  
Plan Name and Account Number

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip Code

Return to:

West Palm Beach Police Pension Fund  
2100 N. Florida Mango Road  
West Palm Beach, Florida 33409

**SOCIAL SECURITY NUMBER COLLECTION DISCLOSURE STATEMENT**

Pursuant to Section 119.071(5)(a)2., Florida Statutes, your social security number is requested for the purpose of determining eligibility for retirement benefits as a plan member, retiree or beneficiary; the processing of retirement benefits; verification of retirement benefits; income reporting; or other notice or disclosures related to retirement benefits. Your social security number will be used solely for one or more of these purposes.

**NOTICE: The Board of Trustees (& Staff) cannot provide financial or tax advice. You are advised to consult with a qualified professional before making any election.**