

INSTRUCTIONS

Use this form to request a plan to plan transfer of assets to your DCP from:

- Your ORPHE account with TIAA, Fidelity, Corebridge Financial (VALIC/AIG), T. Rowe Price, Empower, or MetLife.

Please note that:

1. You may also need to complete forms required by your plan provider.
2. If you are new to VRS, you must be enrolled in your DCP plan with Voya before transferring your assets. Please check with your employer or Voya for enrollment instructions.

PARTICIPANT INFORMATION

NAME: _____ SOCIAL SECURITY NUMBER: _____
(last 4 digits only)

ADDRESS: _____ APT: _____

CITY: _____ STATE: _____ ZIP CODE: _____

DAY PHONE: _____ EVENING PHONE: _____

EMAIL: _____ DATE OF BIRTH: ____/____/____

MARRIED SINGLE

MOVE MY MONEY

Plan-to-Plan Transfer \$ _____ _____% of after-tax contribution (basis) should be moved *(if not provided, 100% will transfer)*.

SELECTED PROVIDERS: TIAA Plan: 500964

DESELECTED PROVIDERS: Fidelity Investments Plan: 89755 Corebridge Financial (VALIC/AIG): 89755

T. Rowe Price: 758004 Great-West/EMPOWER Plan: 95074-01

MetLife: _____

VRS ACCOUNT TRANSFER: VRS Member Contribution Account (Complete VRS 30RP Form)

ENROLLMENT INFORMATION

FOR PARTICIPANTS NEW TO VRS

I have sent my DCP enrollment information to Voya Financial (Voya).

Upon notification of your eligibility by your employer to elect ORPHE, VRS will send you information about your retirement plan options. You have 60 days from your hire date. Once VRS has notified Voya of your selection of DCP as the provider, you will be able to make your investment elections and beneficiary designations online.

If you do not make an election within the provided window, you will automatically be enrolled in the VRS defined benefit plan or Hybrid Retirement Plan, whichever is applicable. Your plan election is irrevocable and is effective upon your hire date.

INVESTMENT ALLOCATION

Assets will be invested in your account according to the allocation instructions for contributions to your account (or to the default fund selected by VRS, if you have not yet provided allocation instructions for the investment of contributions to your account). Voya will send you a confirmation notice when the assets have been received and credited to your account. You will have the ability to request a fund transfer of your assets to any investments available within your plan at any time by contacting Voya or by accessing your account online.

Please go online at dcp.varetire.org or call the VRS Defined Contribution Plans Service Center at 1-877-327-5261 (TTY/TTD users call 1-800-579-5708). Customer Service Associates are available Monday through Friday, 8:00 A.M. to 9:00 P.M. Eastern Time (excluding stock market holidays).

VRS Defined Contribution Plans
Optional Retirement Plan for Higher Education
INCOMING DIRECT ROLLOVER/
PLAN-TO-PLAN TRANSFER REQUEST

PARTICIPANT ACKNOWLEDGEMENT AND SIGNATURE

General Information – I understand that only certain types of distributions are eligible for rollover treatment and that it is solely my responsibility to ensure such eligibility. By signing below, I affirm that the funds I am rolling over are in fact eligible for such treatment. I authorize these funds to be rolled over to my DCP account with Voya and to be invested into the plan according to the contribution allocation instructions on file when the assets are received by Voya.

Withdrawal Restrictions – I understand that the Internal Revenue Code and/or VRS Defined Contribution may impose restrictions on direct rollovers and/or distributions.

Account Corrections – I understand that it is my obligation to review all confirmations and quarterly statements for discrepancies or errors.

My signature indicates that I have read, understand the effect of my elections and agree to all pages of this Plan-to-Plan Transfer form. I affirm that all information provided is true and correct.

PARTICIPANT SIGNATURE _____ **DATE** ____/____/____

MAILING INSTRUCTIONS

Please submit your completed form with supporting documentation to:

VIA MAIL:

Voya Financial
Attn: VRS Defined Contribution Plans
PO Box 990071
Hartford, CT 06199

VIA OVERNIGHT DELIVERY:

Voya Financial
Attn: VRS Defined Contribution Plans
One Orange Way
Windsor, CT 06095

If you have any questions or need to obtain additional plan or account information, please go online at dcp.varetire.org or call the VRS Defined Contribution Plans Service Center at 1-877-327-5261 (TTY/TTD users call 1-800-579-5708). Customer Service Associates are available Monday through Friday, 8:00 A.M. to 9:00 P.M. Eastern Time (excluding stock market holidays).