



ERS Rollover/Transfer In Form

THE STATE OF HAWAII ISLAND SAVINGS PLAN

Instructions

Please print using blue or black ink. You must be enrolled in the State of Hawaii Island Savings Plan. Send completed form to the following address or fax it to **1-866-439-8602**. If faxing, please keep original for your records.

Prudential Retirement, Island Savings Plan

30 Scranton Office Park
Scranton, PA 18507

Questions?
Call 1-888-71-ALOHA
for assistance.

Complete this Rollover/Transfer In Form and follow these instructions:

- Complete this form and return it to Prudential Retirement via fax or mail. Prudential must receive this form prior to receiving the ERS rollover check.
- Contact ERS to initiate Rollover and instruct ERS to make Rollover check payable to Prudential Retirement, Island Savings Plan FBO (Your Name).

About You

Plan number	Sub plan number	000001 State of Hawaii	000004 County of Maui
3 0 0 4 1 1		000002 County of Hawaii	000005 County of Hawaii Water District
		000003 County of Kauai	000006 Waialae Charter School

Payroll Number (Div/sub): _____
(FOR STATE EMPLOYEES ONLY: LOCATED ON TOP PORTION OF YOUR PAYSTUB)

Social Security number	Daytime telephone number
_____ - _____ - _____	_____ - _____ - _____
	<small>area code</small>

First name	MI	Last name
_____	_____	_____

Address

City	State	ZIP code
_____	_____	_____

Date of retirement

_____	_____	_____
<small>month</small>	<small>day</small>	<small>year</small>

Rollover Contribution

- I am currently enrolled in the State of Hawaii Island Savings Plan. I elect to make an ERS rollover contribution to the State of Hawaii Island Savings Plan.
- I understand that the full rollover amount is exempted entirely from the Hawaii State withholding tax.

Selection of Investment Options

If you **are enrolled** in the Plan and you have *not* made a rollover investment election by the time your rollover is processed, your rollover contribution will be invested in the same allocation as your employee contributions, **otherwise** it will be invested according to your current allocation.

If you wish to change your investment elections or transfer funds, you can do so by calling Prudential at 1-888-71-ALOHA or go online at www.prudential.com/online/retirement.

Your Authorization

I certify that all of the assets to be invested as specified from ERS above are eligible to rollover to the State of Hawaii Island Savings Plan. I understand that the Plan will not be held responsible for any tax penalties that may occur for an incomplete submission. If you are currently participating in the State of Hawaii Island Savings Plan, you need to complete a Beneficiary Designation Form. If you need a Form, you may call the Information Line at 1-888-71-ALOHA.

Signature **X** _____ Date _____

