

# SACRAMENTO AREA ELECTRICAL WORKERS TRUST FUNDS

P.O. Box 5057, San Jose, CA 95150 ❖ 6800 Santa Teresa Blvd. Suite 100, San Jose, CA 95119 ❖ (408) 288-4556 ❖ (800) 541-8059

## **Plan to Plan Transfer Form**

This form must be completed by the Plan participant in order to request transfer of Defined Contribution Plan monies he/she may have in an individual account in the IBEW Local 340 Pension Trust to the Defined Contribution Plan in his/her Home Fund.

### **THIS FORM MUST BE NOTARIZED**

Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: ( \_\_\_\_\_ ) \_\_\_\_\_ Home Local Union: \_\_\_\_\_

I, \_\_\_\_\_ hereby request that the IBEW Local 340 Pension Trust, transfer those Defined Contribution Plan (Money Purchase) monies accumulated in my account during the period of time I was employed in the jurisdiction of the IBEW Local 340 to my Home Fund identified below.

Home Fund: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

For monies transferred pursuant to this authorization, I hereby waive any claim on behalf of my dependents to any benefit from any and all liability.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

#### **TO BE COMPLETED BY PLAN REPRESENTATIVE**

Signature of spouse witnessed this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ in the presence of:

\_\_\_\_\_  
Plan Representative Signature

Form of I.D. \_\_\_\_\_

\_\_\_\_\_  
Print Name

*or*

**See Next Page for Notarization**

# CALIFORNIA NOTARY ACKNOWLEDGEMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California  
County of \_\_\_\_\_

On \_\_\_\_\_ before me, \_\_\_\_\_ (insert name and title of the officer), personally appeared \_\_\_\_\_, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature \_\_\_\_\_ (Seal)