

90-24 Transfer Application

Use this form to transfer funds to GuideStone Financial Resources from another Internal Revenue Code Section 403(b)(1) annuity contract, Section 403(b)(7) custodial account, or Section 403 (b)(9) retirement income account.

Application for a 90-24 Transfer to GuideStone

403(b) Retirement Plan

Instructions for Application for a 90-24 Transfer form

- Use of this form is limited to a request for a Revenue Ruling 90-24 Transfer of your funds to GuideStone from another Internal Revenue Code Section 403(b)(1) annuity contract, Section 403(b)(7) custodial account, or Section 403(b)(9) retirement income account. All transferred funds must be 100% vested prior to the 90-24 Transfer.
- A 90-24 Transfer applies only to the transfer of funds between Code Section 403(b) plans. You cannot transfer retirement plan funds from a profit sharing plan, a Code Section 401(k) plan, or other qualified retirement plans to a plan with GuideStone. In addition, you cannot use a 90-24 Transfer to move contributions from an IRA to a plan with GuideStone.
- The information requested should be provided by either you or the 403(b) issuer or custodian from which the 90-24 Transfer is to be made (the Transferring 403(b) Issuer). Failure to secure this information may subject your transferred funds to more restrictive early withdrawal requirements than those imposed prior to the transfer.

Use a separate form for each transfer.

For assistance, please call **1-800-262-0511**.

Return the completed form to:

Retirement Operations
GuideStone Financial Resources, SBC
2401 Cedar Springs Road
Dallas, TX 75201-1498

Mail check overnight or first class mail to:

Finance and Accounting
GuideStone Financial Resources, SBC
FBO (participant name)
2401 Cedar Springs Road
Dallas, TX 75201-1498

PARTICIPANT INFORMATION (THIS FORM MUST BE TYPED OR COMPLETED IN INK. INITIAL ANY CHANGES.)

Participant name: _____ Social Security number: _____

Home address: _____

City: _____ State: _____ ZIP Code: _____

Birth date: ____/____/____ Marital status: Married Single

Daytime telephone: (____) _____ E-mail address: _____

Employer name: _____

Place transfer in the following employer plan with GuideStone: _____

AMOUNTS TO BE TRANSFERRED

A. Account to be rolled over to GuideStone (Indicate the name, address and telephone number of the distributing plan):

Current custodian: _____ Telephone number: (____) _____

Address: _____

City: _____ State: _____ ZIP Code: _____

B. Please liquidate and transfer the following investments to GuideStone:

Account number: _____ Fund name: _____ Entire account Partial _____ \$ or %

Account number: _____ Fund name: _____ Entire account Partial _____ \$ or %

Account number: _____ Fund name: _____ Entire account Partial _____ \$ or %

Account number: _____ Fund name: _____ Entire account Partial _____ \$ or %

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INVESTMENT ALLOCATION

Please indicate how you wish to allocate your 90-24 transfer among the investment funds available. You may select from Option 1 or Option 2. The accumulations will remain in this fund until you change your election.

Option 1

Invest my transfer with the current contribution allocation election on file with GuideStone.

Option 2

Please indicate your choice of investment options provided under your employer's plan. If you wish to allocate your transfer among more than five (5) investment funds, please write them in the space below or attach a separate page. (Please include your name, Social Security number and employer if using a separate page.) **Please use whole percentages. Total percentages must equal 100%.**

Investment option: _____ Percentage: _____ %

Investment option: _____ Percentage: _____ %

Investment option: _____ Percentage: _____ %

Investment option: _____ Percentage: _____ %

Investment option: _____ Percentage: _____ %

Total = 100%

For more information on the funds available to you, please contact your employer or GuideStone at 1-800-262-0511.

ACCOUNTING DETAIL INFORMATION

The portion of the 90-24 Transfer that applies to each of the following types of contributions is indicated below to the extent the information is available: (Failure to complete the information requested may subject the transfer amounts to more restrictive rules than those imposed prior to the transfer.)

	Current employer	Prior employer(s)
A. Total employer (nonelective) contributions & earnings	\$ _____	\$ _____
• Employer contributions	\$ _____	\$ _____
• Earnings on employer contributions	\$ _____	\$ _____
• Pre-89 employer contributions & earnings (For Code Section 403(b)(7) custodial account only)	\$ _____	\$ _____
B. Total salary reduction (elective) contributions & earnings	\$ _____	\$ _____
• Salary reduction contributions	\$ _____	\$ _____
• Earnings on salary reduction contributions	\$ _____	\$ _____
• Pre-89 salary reduction contributions & earnings	\$ _____	\$ _____
C. Total after-tax (tax-paid) contributions & earnings	\$ _____	\$ _____
• After-tax contributions	\$ _____	\$ _____
• All earnings on after-tax contributions	\$ _____	\$ _____
• Pre-87 after-tax contributions	\$ _____	\$ _____
D. Total tax deductible contributions & earnings	\$ _____	\$ _____
E. Total transfer contributions & earnings	\$ _____	\$ _____
F. Total amount of 12/31/86 account balance	\$ _____	\$ _____

CERTIFICATION BY TRANSFERRING 403(B) ISSUER (COMPLETED BY TRANSFERRING 403(B) ISSUER.)

The information provided above accurately reflects our records.

Signature: _____ Date: ____ / ____ / ____

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PARTICIPANT CERTIFICATION AND AUTHORIZATION TO TRANSFER FUNDS (MUST BE SIGNED AND DATED.)

I certify that the 90-24 Transfer is solely attributable to amounts from a Code Section 403(b)(1) annuity contract, 403(b)(7) custodial account, and/or a 403(b)(9) retirement income account and that the amounts to be transferred to GuideStone Financial Resources of the Southern Baptist Convention (GuideStone) are 100% vested.

I understand it is my responsibility to request the 90-24 Transfer from the Transferring 403(b) Issuer and to arrange to have the funds transferred to GuideStone. The Transferring 403(b) Issuer is directed to transfer the amounts listed to GuideStone. This transfer is intended to qualify as a tax-free direct transfer between Code Section 403(b) annuity contracts or accounts and is made pursuant to Revenue Ruling 90-24. The Transferring 403(b) Issuer is directed to make the transferred amount payable to GuideStone for my benefit and to forward the proceeds to: Finance and Accounting, GuideStone Financial Resources SBC, 2401 Cedar Springs Road, Dallas, TX 75201-1498.

GuideStone may rely upon the representations made by me or the Transferring 403(b) Issuer as indicated. Except to the extent otherwise indicated, I authorize GuideStone to treat the 90-24 Transfer as though the amounts are attributable to a transfer of Code Section 403(b) contributions and/or earnings which are subject to the most restrictive withdrawal requirements imposed under the law.

GuideStone is released from any responsibility or liability regarding the accuracy of such representations or any tax consequences resulting from the transfer of these funds.

Participant signature: _____ Date: ____/____/____

TO BE COMPLETED BY GUIDESTONE AS CUSTODIAN

GuideStone Financial Resources of the Southern Baptist Convention will accept a transfer from an eligible retirement plan as authorized under Code Section 402(c)(8) for your benefit. The transfer amount will be credited to your retirement income account at GuideStone governed under Section 403(b)(9) of the Internal Revenue Code.

Signature of GuideStone authorized representative: _____ Date: ____/____/____