

# IRA Rollover Form

## NRECA 401(k) and/or RS Plan assets to Homestead Funds



Use this form to:

- Move NRECA 401(k) **and/or** RS Plan assets to an existing account at Homestead Funds
- Move NRECA **and** RS Plan assets to the same new or existing account at Homestead Funds with different fund selections for each

**If you are transferring assets to a new Homestead Funds account, also complete and return the IRA Account Application.** Please print neatly in blue or black ink. If you have a question about this form, call us at **1-800-258-3030** and say "representative" at the first menu.

Return your completed documents to Homestead Funds using the postage-paid envelope provided, or mail it to:

### REGULAR MAIL

Homestead Funds  
c/o BFDS  
P.O. Box 219486  
Kansas City, MO 64121-9486

### OVERNIGHT MAIL

Homestead Funds  
c/o BFDS  
330 W. 9th Street, 1st Floor  
Kansas City, MO 64105-1514  
Attn: Shareholder Services

 Be sure to sign your completed form (section 3).

### 1. Account Information

First Name	Middle Initial	Last Name
Social Security Number		
Street Address		
City	State	ZIP
Daytime Phone Number		

Indicate whether this rollover is to a new or existing account.

- New (Make sure you complete the IRA Account Application and return it with this Form.)
- Existing

Existing Account Number

**Note:** If you are rolling over Roth 401(k) assets or are rolling over non-taxable assets to a Regular Account, call us at **1-800-258-3030**.

## 2. Fund Selections

Tell us how your dollars should be allocated by fund. If rolling over to a new account, write "NEW" under the heading Account Number and return your IRA Rollover Form with a completed IRA Account Application.

### 401(k) Plan Fund Selections

Fund Name	Account Number	Investment Allocation	
Daily Income (168) .....	_____	\$ _____	or _____ %
Short-Term Gov. (170).....	_____	\$ _____	or _____ %
Short-Term Bond (172) .....	_____	\$ _____	or _____ %
Stock Index (174).....	_____	\$ _____	or _____ %
Value (176) .....	_____	\$ _____	or _____ %
Small-Company (178) .....	_____	\$ _____	or _____ %
International Value (180).....	_____	\$ _____	or _____ %
Growth (182) .....	_____	\$ _____	or _____ %
<b>Total .....</b>		<b>\$ _____</b>	<b>or 100%</b>

### RS Plan Fund Selections

Fund Name	Account Number	Investment Allocation	
Daily Income (168) .....	_____	\$ _____	or _____ %
Short-Term Gov. (170).....	_____	\$ _____	or _____ %
Short-Term Bond (172) .....	_____	\$ _____	or _____ %
Stock Index (174).....	_____	\$ _____	or _____ %
Value (176) .....	_____	\$ _____	or _____ %
Small-Company (178) .....	_____	\$ _____	or _____ %
International Value (180).....	_____	\$ _____	or _____ %
Growth (182) .....	_____	\$ _____	or _____ %
<b>Total .....</b>		<b>\$ _____</b>	<b>or 100%</b>

 **Be sure to sign this form. We cannot act on your instructions without your signature.**

## 3. Signature

I authorize the rollover of assets to a Homestead Funds IRA and authorize Homestead Funds and State Street Bank and Trust Company, Custodian, to process this request on my behalf.

▶ **X** \_\_\_\_\_ Date \_\_\_\_\_  
Signature of Account Owner