

# Homestead Funds Instructions

Please call us at **1-800-258-3030** and say “representative” at the first menu to assist you in completing the correct forms.

We are here to help!

## If rolling over to an **EXISTING** Homestead Funds IRA account:

- **401(k) Plan assets only**—complete the IRA Rollover Form to direct your fund selection
- **RS Plan assets only**—complete the IRA Rollover Form to direct your fund selection
- **401(k) and RS Plan assets to the same account**—complete the IRA Rollover Form to direct your fund selection

## If rolling over to a **NEW** Homestead Funds IRA account:

- **401(k) Plan assets only**—complete the IRA application only
- **RS Plan assets only**—complete the IRA application only
- **401(k) and RS Plan assets to the same account with different fund selections for each**
  - complete the IRA Application **AND** the IRA Rollover Form and submit together
  - enter your fund selections on the IRA Rollover Form, not the IRA Application
- **401(k) and RS Plan assets to the same account with the same fund selections for each**
  - Complete the IRA Application only

Submit all applications and forms to:

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

If you need assistance with the following or any other scenarios please call us at **1-800-258-3030** and say “representative” at the first menu:

- Rolling over Roth 401(k) assets to Homestead Funds
- Rolling non-taxable assets to Homestead Funds
- Rolling 401(k) and RS Plan assets to separate Homestead Funds accounts

# Homestead Funds Instructions (in table format)



Please call us at **1-800-258-3030** and say “representative” at the first menu to assist you in completing the correct forms.

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## If rolling over to an EXISTING Homestead Funds IRA account:

Complete the **IRA Rollover Form**  
to direct your fund selection

401(k) Plan assets only	✓
RS Plan assets only	✓
401(k) and RS Plan assets to the same account	✓

## If rolling over to a NEW Homestead Funds IRA account:

	Complete the IRA application	Complete the IRA Rollover Form
401(k) Plan assets only	✓	
RS Plan assets only	✓	
401(k) and RS Plan assets to the same account with <u>different</u> fund selections for each	✓ (Skip fund selection section)	✓
401(k) and RS Plan assets to the same account with the <u>same</u> fund selections for each	✓	

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