

403(b) Transaction Processing

All transactions require a Transaction Routing Request form. The Transaction Routing Request Form provides important information regarding your request and is vital to ensuring proper processing.

Distributions

Distribution transactions may include any of the following: loan, contract exchange, rollover, hardship withdrawal or cash distributions. Each product provider requires their own form to be submitted. You may request distributions by completing the necessary forms obtained from your investment product provider, other necessary documentation as indicated below and submitting all completed documents to TSACG for processing.

Transaction Requested	Forms needed for Processing
Contract Exchanges, incoming and outgoing	Submit complete provider paperwork for transaction and the following form: *Completed Transaction Routing Request form (including Box B)
403(b) Hardship Withdrawals	Submit complete provider paperwork for transaction and the following forms and/or documentation: *Completed Transaction Routing Request form *Completed Hardship Withdrawal Disclosure form *Evidence of expenses equal or more than amount requesting <i>Please verify that you have completed Box A on the form if you are submitting a transaction for a Financial Hardship Withdrawal.</i> <i>Please note that evidence of expenses MUST be provided for approval of request.</i>
403(b) Loan Withdrawals	Submit complete provider paperwork for transaction and the following form: *Completed Transaction Routing Request form (including Box C)
Rollovers and/or 403(b) Cash Withdrawal (due to qualifying event only)	Submit complete provider paperwork for transaction and the following form: *Completed Transaction Routing Request form (including Box A)

Important: If your rollover or withdrawal request is due to the qualifying event of separation from service your termination date must be verified by your employer. Including a copy of a termination letter from your employer that verifies the date and will help to expedite your request. Failure to include this information may result in delays in processing, as TSACG will have to request termination date verification from the employer and await response in order to process your request.

Contract Exchanges

As of January 1, 2009, participants may only exchange their accounts among the authorized providers in the employer's 403(b) Plan.

After verifying that the selected new provider is a current authorized provider, you must complete any forms required by the provider (usually supplied by the new provider), as well as a Transaction Routing Request form. All completed forms should be submitted to TSACG for processing.

Submitting Transaction Requests

All transaction requests should be submitted to TSACG for processing via fax or mail:

TSA Consulting Group, Inc.
Attn: Participant Transaction Department
P.O. Box 4037
Fort Walton Beach, FL 32549-4037
Fax: 1-866-741-0645

TSACG wants to assist you in the most efficient manner possible. Carefully reviewing all documentation, verifying that you have signed all necessary forms, and verifying that you have included any necessary evidence will help us to reach this goal and avoid delays that are caused by incomplete documentation. Our customer service representatives are available to assist you at 1-888-796-3786 or recordkeeping@tsacg.com