

GLP Strategic Administrative Group, LLC

Instructions for Submitting Distributions for Signatures:

For Transfers, Withdrawals, & Loans-

Fill out all paperwork associated with the transaction provided by your financial advisor or Investment Provider (ex. American Funds). A Distribution/Transfer/Loan request voucher will also be required to process any request. You can find the form at www.glpwins.com, under the GLP Strategic Administrative Group drop-down, in the district forms link. The SECOND form on the list,

(link: <http://glpvfms.com/disttransloanreqform.pdf>) is the form you will need to complete. This form will help us attain the pertinent information needed to sign off on any distribution, and will also allow us to route the paperwork after it has been signed. **IF** your Investment Provider will allow a fax copy of our signature, then you may fax your request (with the <http://glpvfms.com/disttransloanreqform.pdf> routing voucher) to 248-876-9657.

Please allow 3-5 business days for the processing of all transactions.

For Hardship Withdrawals-

Fill out all paperwork associated with the hardship withdrawal provided by your financial advisor or Investment Provider (ex. American Funds). A Hardship Withdrawal Disclosure voucher will also be required to process any request. You can find the form at www.glpwins.com, under the GLP Strategic Administrative Group drop-down, in the district forms link. The FIRST form on the list,

(link: http://glpvfms.com/403b_Hardship_Withdraw_Disclosure.pdf) is the form you will need to complete. This form will help us attain the pertinent information needed to sign off on the hardship, and will also allow us to route the paperwork after it has been signed. **IF** your Investment Provider will allow a fax copy of our signature, then you may fax your request (with the http://glpvfms.com/403b_Hardship_Withdraw_Disclosure.pdf routing voucher) to 248-876-9657.

Please Note: The IRS will only allow a hardship withdrawal for certain reasons. With your paperwork, you must also provide the proof of your reason for hardship (ex. Medical bills, tuition stubs, etc.). If the proof is not sufficient, the hardship will be denied. Also, when taking a hardship, any contributions to your 403(b) must be ceased for 6 months. If you are currently contributing, please submit a salary reduction agreement to your payroll office to stop your contributions.

Please allow 3-5 business days for the processing of all transactions.

Distribution / Transfer / Loan Request Form

Instructions: To Facilitate processing, this form should accompany any contract exchange, rollover, distribution, or loan request paperwork provided by your 403(b) company or representative. This form must be completed by the employee and/or agent.

IMPORTANT! ☐ Please check this box if you are returning additional information for a previously submitted transaction.

Employer

Employee Name

Employee Mailing Address

City, State, Zip

Employee Phone

Employee Email

Termination Date (If Applicable)

SSN

DOB

Please check all your inputs for accuracy.

I am requesting a ☐ Distribution ☐ Loan from my 403(b) or 403(b)(7) account with _____ (Company Name)

☐ In service Contract Exchange ☐ IRA Rollover ☐ Transfer from 403(b) , 403(b)(7) , 457(b) account with

(Company Name)

to _____
(Company Name)

(Transaction form is invalid if date signed is more than 90 days from date of attached forms.)

Employee Signature

Date Signed

Once completed, GLP Strategic Administrative Group should forward this form and all paperwork associated with this transaction to:

☐ Employee (to same address as above)

☐ Representatives Name _____

Send to the following fax
or mailing address:

Fax

Address

Address

Representatives e-mail _____

☐ Company - Send to the following fax or mailing address:

Fax

Address

Address

Submit Completed Form and All Accompanying Paperwork To:

GLP Strategic Administrative Group
37000 W. 12 Mile Rd. Suite 101
Farmington Hills, Mi. 48331
Fax: 248-876-9657

DO NOT WRITE IN THIS SECTION

Transaction Request Approved:

Printed Name

Date Signed

Signature

Title