

FINANCIAL PATHWAY 403(b) Plan Transaction Request Form

900 S Capital of TX Hwy, Ste. 350 Austin, TX 78746 financialpathway403b@tcgservices.com P: 800.943.9179 F: 888.989.9147

Please submit completed form via fax, email or mail Sections A-D must be complete for processing

A. INFORMATION ABOUT THE PARTICIPANT (OR BENEFICIARY IF DEATH CLAIM)									
ull Name				Social Security #	:				
Street Address				Date of Birth					
Apt/Bldg #				Contact Phone					
City, State, Zip				Contact Email					
EMPLOYER (Through which you had this account)				Nonresident Alie	en?	☐ YES ☐ NO			
P)	Would you like to receive status updates of your request via text message? Message & Data rates may apply			☐ YES ☐ Mobile Phone #	□ NC)			
B. REASON FOR DISTRIBUTION FILL IN <u>ONE</u> REASON ONLY									
□ No Longer Employed by Employer Listed Above			Date of Sep	aration:					
☐ Attained Age 59 ½									
☐ Death of Participant			Please provide Death Certificate						
☐ Minimum Distribution			Participant is age 70 ½ or older and is terminated						
☐ Transfer to Purchase Service			Please submit a form showing the public pension plan that funds are being transferred to						
☐ Permanent & Total Disab	ility of Participant		Date became Disabled:						
			Mark one of the following reasons for the request:						
□ Handship Distribution / Loss Due to Hurrisone			☐ Payment of Medical Care expenses						
			☐ The purchase of my Principal Residence						
			☐ Payment of Tuition and Related Fees for myself or dependents						
		_	☐ Prevention of eviction or foreclosure on my principal residence						
☐ Hardship Distribution/ Loss Due to Hurricane Harvey/Irma/ Maria			☐ Payment for burial or funeral expenses for my parent, spouse, children or dependents						
			☐ Expenses for the repair of damage to my principal residence that would qualify for the casualty deduction under section 165						
			☐ Expenses related to Hurricane Harvey/Hurricane Irma/Hurricane Maria/California Wildfires						
☐ Other:	Other: Must qu			ify under plan and tax rules					
c. DISTRIBUTION INST	RUCTIONS								
		Check box fo	or partial w	vithdrawal of:	_				
			eck for full distribution		\$				
All or a portion of your distribution is eligible to be rolled over into another retirement account. Please review the attached Special Tax Notice. If you choose the cash distribution option, a mandatory 20% (30% for nonresident aliens) federal income tax withholding will be deducted from your									

distribution. Federal law requires the automatic Federal income tax withholdings for cash distributions over \$200. The distribution check will be

Page **1** of **2**

made payable to you and will be mailed to the address provided above.



DISTRIBUTION INSTRUCTIONS CONTINUED

☐ Qualified Rollover of (IRA, 403(b), 457(b), 401(l			ubmit the receiving institution's rollover paperwork (if required) or submit a acceptance along with this form to TCG. Funds cannot be sent without this.						
		Amount Requested:	\$						
☐ Hardship Cash Distribution		If you choose this option, 10% federal income tax withholding will be deducted from your distribution unless you elect a different tax percentage below: ☐ Do not withhold any taxes. I will pay my taxes when I file my US Tax Return ☐ I elect to withhold federal income taxes at the rate of% (15-50%)							
D. ACCEPTANCE AND	ALITUODIZATION /	DI FASE SIGNI DEL OVA/							
	-	PLEASE SIGN BELOW)	listed shows and suthering	. 41	ft :d:td				
By my signature below, I re understand that my account money									
Signature of Participant (or Beneficiary if Death claim)		Date							
SPOUSE CERTIFICATION (REQUIRED)									
By my signature below, I rep indicated. I understand that receive any money.									
Signature of Spouse	Date								
OR									
By my signature below, I rep	resent that I am not	married.							
Signature of Participant				Date					
above and after being first d contents thereof			oper identification as to bei ove Spouse Certification und						
Signature of Notary		Notary Seal	Date	e					
PLAN ADMINISTRA	ATOR AUTHORIZATI	ON (REQUIRED)	<u>'</u>						
*Authorized Signature & Title				Date					

NOTE: If additional contributions are received after a final distribution has occurred, TCG Administrators will process the second request exactly as specified on this form and an additional distributions fee will be charged.

FINPT0618 Page 2 of 2

^{*}If your TPA provides a certificate of approval, TCG will accept the certificate in lieu of a Plan Administrator signature.