



Fringe Benefits Consortium

**County Schools FBC Deferred Compensation Program
Complete Enrollment Packet**

Form:	Purpose:
FBC Nationwide Enrollment Form	To enroll in the program
FBC Salary Reduction Agreement	To establish your monthly contribution amount
FBC 2012 Maximum Contribution Worksheet	To determine your 2012 maximum eligible contribution amount
FBC Transfer In/Rollover In Request Form	To transfer or rollover your previous retirement accounts into the program

If you need assistance completing any of the Enrollment Packet Forms, please contact your district's Retirement Specialist. The contact information for your district's Retirement Specialist is available on the FBC website, www.fbcretire.com, by clicking on "Retirement Specialists".

Fringe Benefits Consortium (FBC)
6401 Linda Vista Road Room 506, San Diego, CA 92111
Fax: (800) 597-8206 / Phone: (800) 560-5060 ext. 3816
www.fbcretire.com

FBC Nationwide Enrollment Form

Case #196-80051



Fringe Benefits Consortium

Instructions	The FBC Enrollment Form is to be used to create an individual participant account under the FBC Nationwide Trust Account which has been established to receive 403(b), 457(b), and 401(a) contributions for the FBC Retirement Programs. This is an initial election form only. Subsequent election changes must be made via the internet at www.fbcretire.com or by phone at 1-800-772-2182. Upon completion of this form please fax a copy to 1-800-597-8206. Keep the original for your records.			
Employee Information	Participant Name	Social Security Number		
	School District (Employer)	Phone Number		
	Participant Mailing Address	Email Address		
	(Street)	Date of Birth	Date of Hire	
	(City, ST ZIP)			
Investment Elections	<p>Make allocations in whole percent increments. Percentages must total 100%. These allocations will be used for all deposits for the 401(a), 403(b) and/or 457(b) Plans. All investments carry a 0.25% annual administration fee. Vanguard and American Funds investments (marked *) carry an additional 0.35% annual administration fee.</p> <div data-bbox="329 541 418 625"> </div> <div data-bbox="435 541 878 569"> <h3>Do It For Me - Meeder Financial</h3> </div> <div data-bbox="435 573 1373 659"> <p>Initial this box if you would like Meeder Advisory Services to monitor and manage your account for you in accordance with your risk tolerance and investment goals. Contributions and assets will be placed into the Money Market Fund until Meeder begins managing your account. An additional 0.65% annual management fee applies to this plan option. A separate application must be completed and submitted for Meeder to manage your account. Download the Meeder MAP+ Program Application at www.fbcretire.com/forms.</p> </div> <div data-bbox="1414 569 1479 642"> <input type="checkbox"/> Initial </div> <div data-bbox="329 667 418 751"> </div> <div data-bbox="435 657 976 684"> <h3>Do It For Me - Nationwide ProAccount®</h3> </div> <div data-bbox="435 688 1364 783"> <p>Initial this box if you would like Nationwide ProAccount® to monitor and manage your account for you in accordance with your personal profile, age, and risk tolerance. Contributions and assets will be placed into the Money Market Fund until ProAccount® begins managing your account. An additional 0.70% annual management fee applies to this plan option. A separate application must be completed and submitted for ProAccount® to manage your account. Download the Nationwide ProAccount® Application at www.fbcretire.com/forms or contact your Nationwide Retirement Specialist.</p> </div> <div data-bbox="1414 688 1479 762"> <input type="checkbox"/> Initial </div> <div data-bbox="329 804 418 888"> </div> <div data-bbox="435 793 626 827"> <h3>Help Me Do It</h3> </div> <div data-bbox="435 827 919 898"> <p>Select the Nationwide Investor Destination Fund that best fits your time horizon and investor profile. It is recommended that you allocate 100% to the fund that best fits your profile.</p> </div> <div data-bbox="435 915 790 936"> <p>Nationwide Investor Destination Funds</p> </div> <div data-bbox="435 936 768 1045"> <p> <input type="checkbox"/> % Aggressive (970)(NDASX) <input type="checkbox"/> % Moderate Aggressive (971)(NDMSX) <input type="checkbox"/> % Moderate (972)(NSDMX) <input type="checkbox"/> % Moderate Conservative (973)(NSDCX) <input type="checkbox"/> % Conservative (974)(NDCSX) </p> </div> <div data-bbox="1036 869 1321 892"> <p>Fidelity Freedom Funds (Target Date)</p> </div> <div data-bbox="967 892 1385 1045"> <p> <input type="checkbox"/> % Fidelity Advisor Freedom 2020 A (1304)(FDAFX) <input type="checkbox"/> % Fidelity Advisor Freedom 2025 A (1293)(FATWX) <input type="checkbox"/> % Fidelity Advisor Freedom 2030 A (1305)(FAFEX) <input type="checkbox"/> % Fidelity Advisor Freedom 2035 A (1294)(FATHX) <input type="checkbox"/> % Fidelity Advisor Freedom 2040 A (1306)(FAFFX) <input type="checkbox"/> % Fidelity Advisor Freedom 2045 A (1893)(FFFZX) <input type="checkbox"/> % Fidelity Advisor Freedom 2050 A (1894)(FFFLX) </p> </div> <div data-bbox="329 1066 418 1150"> </div> <div data-bbox="435 1056 651 1089"> <h3>I'll Do It Myself</h3> </div> <div data-bbox="435 1106 857 1157"> <p>A list of Investment Fact Sheets can be view at our website by selecting the Investment Options tab at fbcretire.com</p> </div> <div data-bbox="496 1176 649 1199"> <p>International Funds</p> </div> <div data-bbox="435 1197 862 1283"> <p> <input type="checkbox"/> % Oppenheimer Developing Markets (844)(ODMAX) <input type="checkbox"/> % Thornburg International Value (427)(TGVIX) <input type="checkbox"/> % *Amer-Capital World Grow & Income (1395)(RWIFX) <input type="checkbox"/> % *Amer-New Perspective Fund (1499)(RNPFX) </p> </div> <div data-bbox="496 1283 596 1306"> <p>Bond Funds</p> </div> <div data-bbox="435 1304 907 1438"> <p> <input type="checkbox"/> % Pimco Total Return (138)(PTTAX) <input type="checkbox"/> % American Century Inflation Adjusted Bond (707)(AIAVX) <input type="checkbox"/> % RidgeWorth High Income (2405)(SAHIX) <input type="checkbox"/> % *Amer-Intermediate Bond Fund of America (1497)(RBOFX) <input type="checkbox"/> % *Vanguard Short-Term Bond Index (1445)(VBISX) <input type="checkbox"/> % *Vanguard Inflation-Protected Securities (1443)(VIPSX) </p> </div> <div data-bbox="496 1438 633 1459"> <p>Large Cap Funds</p> </div> <div data-bbox="435 1457 878 1629"> <p> <input type="checkbox"/> % Oppenheimer Main Street A (856)(MSIGX) <input type="checkbox"/> % S&P 500 Index (356)(GRMSX) <input type="checkbox"/> % *Amer-Growth Fund of America (1397)(RGAFX) <input type="checkbox"/> % *Amer-Investment Company of America (1399)(RICFX) <input type="checkbox"/> % *Amer-Washington Mutual Investors (1400)(RWMFX) <input type="checkbox"/> % *Vanguard Windsor II Fund (1515)(VWNFX) <input type="checkbox"/> % *Vanguard Value Index (1448)(VIVAX) <input type="checkbox"/> % *Vanguard Growth Index fund (1508)(VIGRX) </p> </div> <div data-bbox="1036 1108 1157 1134"> <p>Mid Cap Funds</p> </div> <div data-bbox="967 1131 1352 1199"> <p> <input type="checkbox"/> % Dreyfus Mid Cap Value (733)(DMCVX) <input type="checkbox"/> % *Principal Mid Cap Blend Inst (2297)(PCBIX) <input type="checkbox"/> % Invesco Mid Cap Equity (411)(GTAGX) </p> </div> <div data-bbox="1036 1197 1174 1220"> <p>Small Cap Funds</p> </div> <div data-bbox="967 1218 1390 1306"> <p> <input type="checkbox"/> % Wells Fargo Small Cap Value (302)(SMVAX) <input type="checkbox"/> % Invesco Small Cap Growth (437)(GTSAX) <input type="checkbox"/> % *Amer-Small Cap World Fund (1501)(RSLFX) <input type="checkbox"/> % *Vanguard Small-Cap Value Index (1447)(VISVX) </p> </div> <div data-bbox="1036 1304 1167 1329"> <p>Balanced Funds</p> </div> <div data-bbox="967 1327 1378 1438"> <p> <input type="checkbox"/> % *Amer-American Balanced Fund (1490)(RLBFX) <input type="checkbox"/> % *Amer-Capital Income Builder (1494)(RIRFX) <input type="checkbox"/> % *Amer-Income Fund of America (1398)(RIDFX) <input type="checkbox"/> % *Vanguard Wellington Fund (1514)(VWELX) <input type="checkbox"/> % *Vanguard Wellesley Income (1449)(VWINX) </p> </div> <div data-bbox="1036 1438 1167 1459"> <p>Specialty Funds</p> </div> <div data-bbox="967 1457 1421 1587"> <p> <input type="checkbox"/> % Franklin Biotech Discovery (271)(FBDIX) <input type="checkbox"/> % Invesco Real Estate Fund (576)(IARAX) <input type="checkbox"/> % Oppenheimer Gold & Special Minerals (374)(OPGSX) <input type="checkbox"/> % Wells Fargo Utility & Telecomm (2386)(EVUAX) <input type="checkbox"/> % Invesco Energy Fund (788)(FSTEX) <input type="checkbox"/> % *Vanguard REIT Index (1444)(VGSIX) </p> </div> <div data-bbox="1036 1587 1190 1610"> <p>Stable Value Funds</p> </div> <div data-bbox="967 1608 1284 1652"> <p> <input type="checkbox"/> % Money Market Fund (688)(GMIXX) <input type="checkbox"/> % **Fixed Option (8002) </p> </div> <div data-bbox="1036 1652 1513 1717"> <p>*I understand that a market value adjustment may apply if I move money out of the Fixed Account and that Meeder Financial Active Management is unable to manage this fund. Initial _____</p> </div>			
Beneficiary Designation	Primary Beneficiary*	Social Security Number	Relationship	*If you are married you must name your spouse as your primary beneficiary unless your spouse signs a waiver.
	Primary Beneficiary	Social Security Number	Relationship	
	Secondary Beneficiary	Social Security Number	Relationship	
Employee Signature	I understand that the above investment elections may involve financial risk. "Market Timing" is not permitted in this retirement program. There is no guarantee as to the timeliness of investment transactions including investment change requests. Fees may be assessed to Plan Assets for Administrative Expenses.			
	Employee Signature X	Date		

Upon completion, fax a copy to 1-800-597-8206.

FBC Salary Reduction Agreement

457(b), 403(b) and Roth 403(b)



Fringe Benefits Consortium

Instructions	The FBC Salary Reduction Agreement is to be used to establish or change with your employer the dollar amount that you want to have deducted from your paycheck as contributions to your selected investment company(s). Upon completion, PLEASE SUBMIT THE ORIGINAL TO YOUR PAYROLL OFFICE . Please also fax a copy of this form to (800) 597-8206.																										
Employee Information	Participant Name	Social Security Number																									
	School District (Employer)	Home Phone Number																									
	Participant Mailing Address <small>(Street)</small>	E-mail Address																									
	<small>(City, ST ZIP)</small>	Date of Birth	Number of Pay Periods Per Year <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 12 <input type="checkbox"/>																								
Purpose	<input type="checkbox"/> I want to STOP CONTRIBUTIONS to my current provider Effective Date: _____ <input type="checkbox"/> I want to BEGIN CONTRIBUTIONS or RESUME CONTRIBUTIONS Effective Date: _____ <input type="checkbox"/> I want to CHANGE FUTURE CONTRIBUTION AMOUNTS and/or PROVIDER Effective Date: _____																										
457(b)	<input type="checkbox"/> I hereby agree to reduce my eligible salary or wages on <i>each pay period</i> by \$_____ and direct my Employer to contribute this amount on my behalf to the investments options I have selected under the Fringe Benefits Consortium Nationwide 457(b) account. [Vendor Code # 27000]																										
403(b)	<input type="checkbox"/> I hereby agree to reduce my eligible salary or wages <i>each pay period</i> by the amount(s) specified below and direct my Employer to contribute this amount on my behalf to my 403(b) account(s) to the investment company(s) specified below: <table border="1" style="width:100%; margin-top: 10px;"> <thead> <tr> <th style="width:50%;">Vendor Name</th> <th style="width:10%;">Code #</th> <th style="width:10%;">VIN #</th> <th style="width:30%;">Dollar Amount</th> </tr> </thead> <tbody> <tr> <td><i>Fringe Benefits Consortium Nationwide 403(b)</i></td> <td><i>25000</i></td> <td><i>1144</i></td> <td>\$</td> </tr> <tr> <td>Other:</td> <td></td> <td></td> <td>\$</td> </tr> <tr> <td>Other:</td> <td></td> <td></td> <td>\$</td> </tr> <tr> <td>Other:</td> <td></td> <td></td> <td>\$</td> </tr> <tr> <td>TOTAL</td> <td></td> <td></td> <td>\$</td> </tr> </tbody> </table>			Vendor Name	Code #	VIN #	Dollar Amount	<i>Fringe Benefits Consortium Nationwide 403(b)</i>	<i>25000</i>	<i>1144</i>	\$	Other:			\$	Other:			\$	Other:			\$	TOTAL			\$
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Other:			\$																								
TOTAL			\$																								
Roth 403(b)	<input type="checkbox"/> I hereby agree to reduce my eligible salary or wages on an after tax basis <i>each pay period</i> by \$_____ and direct my Employer to contribute this amount on my behalf to the investment options I have selected under the Fringe Benefits Consortium Nationwide Roth 403(b) account. [Vendor Code # 80100]																										
Employee Approval	<p>I understand and agree to the following:</p> <ol style="list-style-type: none"> this Salary Reduction Agreement is legally binding and irrevocable with respect to amounts paid or available while this agreement is in effect; this Salary Reduction Agreement may be terminated at any time for amounts not yet paid or available, and that a termination request is permanent; and, this Salary Reduction Agreement may be changed with respect to amounts not yet paid or available. <p>Nothing herein shall affect the terms of employment between the Employer and myself. This agreement supersedes all prior Salary Reduction Agreements and shall automatically terminate if my employment is terminated.</p> <p>I understand that I may not contribute an amount which will exceed the annual additions limitation under Code Section 415 or permit excess elective deferrals under Code Section 402(g).</p> <p>In the event that I exceed my maximum contribution limit to my FBC Nationwide 457(b) Plan, I authorize any excess contribution to be made into my FBC Nationwide 403(b) plan or vice versa.</p> <p>I understand that the provisions of the <i>457(b), 403(b), and Roth 403(b) Estimated Maximum Contribution Worksheet</i>, Employer policy statement, and other enrollment information are legally binding and are incorporated herein by reference.</p> <p>I understand that by making this application the release of my confidential information to third parties may occur as necessary to administer the Plan in accordance with the Internal Revenue Code.</p> <p>I understand that as compensation for general plan administration and compliance services, National Benefit Services, LLC receives \$2.00 per month for each employee making a salary deferral to the plan. This fee is invoiced to the employee's investment provider(s).</p> <table border="1" style="width:100%; margin-top: 10px;"> <tr> <td style="width:70%;">Employee Signature X</td> <td>Date</td> </tr> </table>			Employee Signature X	Date																						
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Employer Approval	Approved By District	Keyed by	Paycheck Date																								

Upon completion, submit the original form to your district payroll office and fax a copy to (800) 597-8206.

2012 Maximum Contribution Worksheet - Part 1

457(b), 403(b), and Roth 403(b) Estimated Maximum Contribution Worksheet



Fringe Benefits Consortium

Instructions	The 2012 Maximum Contribution Worksheet - Part 1 is to be used to determine the maximum dollar amount that you may contribute to the 457(b), 403(b) and/or Roth 403(b) Programs in 2012. Upon completion, please submit the original form to your district payroll office. Please also fax a copy of this form to (800) 597-8206.	
Employee Information	Participant Name	Social Security Number
	School District (Employer)	Home Phone Number
	Participant Mailing Address (Street)	Work Phone Number
	(City, ST ZIP)	E-mail Address
457(b) Calculation	1. Annual base deferral limit:	1. <input type="text" value="\$17,000.00"/>
	2. Age 50 Catch-up Contribution:	2a. YES / NO
	a. Will you reach age 50 by 12/31/2012?	2b. <input type="text"/>
	b. If 2a is YES, enter \$5,500 in line 2b. If 2a is NO, enter \$0 in line 2b.	3. <input type="text"/>
	3. Final Three Year Catch-up Contribution Enter your answer from question 12 of Part 2 of this form (second page). If you are not eligible for the Final Three Year Catch-up, enter \$0.	4. <input style="border: 2px solid black;" type="text"/>
	4. Add lines 1 and the greater of lines 2b or 3. This is your Maximum 457(b) Contribution Amount for 2012. <i>This number cannot exceed \$34,000.</i>	5. <input type="text"/>
	5. Enter the total of any contributions already made to 457(b) plans during 2012.	6. <input type="text"/>
403(b) and Roth 403(b) Calculation	1. Annual base deferral limit	1. <input type="text" value="\$17,000.00"/>
	2. Special 15-Year Catch-up Contribution	2a. YES / NO
	a. Have you completed 15 or more full years of service with you current school district? If NO, enter \$0 in line 2e and proceed to question 3. If YES, continue to the next question.	2b. YES / NO
	b. Have your previous combined 403(b) and Roth 403(b) contributions averaged less than \$5,000 per year? If NO, enter \$0 in line 2e and proceed to question 3. If YES, continue to the next question.	2c. YES / NO
	c. Have you made any Special 15-Year Catch-up contributions previously? If NO, skip to question 2e. If YES, continue to next question.	2d. <input type="text"/>
	d. Enter the total amount of any previously utilized Special 15-Year Catch-up contributions in line 2d.	2e. <input type="text"/>
	e. Subtract line 2d from \$15,000. If the result is greater than \$3,000 then enter \$3,000 in line 2e. If the result is less than \$3,000 then enter the result in line 2e.	3a. YES / NO
	3. Age 50 Catch-up Contribution	3b. <input type="text"/>
	a. Will you reach Age 50 by 12/31/2012?	4. <input style="border: 2px solid black;" type="text"/>
	b. If 3a is YES, enter \$5,500 in line 3b. If 3a is NO, enter \$0 in line 3b.	5. <input type="text"/>
	4. Add lines 1, 2e, and 3b. This is your Maximum 403(b) and Roth 403(b) Contribution Amount for 2012. <i>This number cannot exceed \$25,500.</i>	6. <input type="text"/>
	5. Enter the total of any contributions already made to 403(b) plans during 2012.	
	6. Subtract line 5 from line 4. This is the total remaining amount you may contribute to 403(b) plans during 2012.	
Employee Signature	IMPORTANT: You may rely on the accuracy of this Worksheet if the information you provide is correct and complete. Neither the Fringe Benefits Consortium (FBC), your School District, nor National Benefit Services, LLC will review data for purposes of verifying the 403(b) Special 15-Year Catch-up Contribution. By signing this Worksheet, you certify that all the information provided is accurate and you agree to indemnify and hold harmless the FBC, your School District, and National Benefit Services, LLC from any and all damages which may result from providing inaccurate or incomplete information. You understand and agree that your total annual contributions to the combined 403(b) and Roth 403(b) Plans may not exceed the lesser of \$49,000 or 100% of compensation.	
Employee Signature X	Date	

Upon completion, submit the original form to your district payroll office and fax a copy to (800) 597-8206.

2012 Maximum Contribution Worksheet - Part 2

457(b) Final Three Year Catch-up Calculation



Fringe Benefits Consortium

Instructions	The 2012 Maximum Contribution Worksheet - Part 2 is to be used to determine if you are eligible for the 457(b) Final Three Year Catch-up contribution. This catch up option is only available to you if you are in your final 3 years of employment prior to attaining your Normal Retirement Age. Upon completion, please submit the original form to your district payroll office. Please also fax a copy of this form to (800) 597-8206.							
Determine Year of Normal Retirement Age	1.	Are you eligible or will you become eligible for retirement benefits under PERS, STRS, or another retirement system before or during 2015? If YES, go to question 2. If NO, you are not eligible for the final Three Year Catch-up and you are finished with Part 2 of the Maximum Contribution Worksheet.			1. YES / NO			
	2.	In what calendar year did you become or will you become eligible for retirement benefits under PERS, STRS, or another retirement system?			2. <input style="width:100px;" type="text"/>			
	3.	In what calendar year will you terminate employment with your San Diego County School District?			3. <input style="width:100px;" type="text"/>			
	4.	You may designate any year between answer #2 and answer #3 as the year in which you will reach your Normal Retirement Age. What year do you designate as the year in which you will reach Normal Retirement Age? Please note: your designation will only be used for purposes of calculating your 457(b) Final Three Year Catch-up. It will not determine the year in which you may actually retire. However, once you have utilized the Final Three Year Catch-up limitation under Section 4.2 of the Plan Document or under a comparable provision of another eligible deferred compensation plan, your Normal Retirement Age may not thereafter be changed for the purpose of funding your Final Three Year Catch-up contribution.			4. <input style="width:100px;" type="text"/>			
	5.	What are the three years prior to the year you designated on line 4? Enter the years on lines 5a, 5b, and 5c. These are the years in which you may utilize the 457(b) Final Three Year Catch-up contribution. If boxes 5a, 5b, or 5c do not include the current year, you cannot utilize the catch-up in the current year and must enter \$0 in line 3 of Part 1 of this worksheet (first page).			5a. <input style="width:100px;" type="text"/> 5b. <input style="width:100px;" type="text"/> 5c. <input style="width:100px;" type="text"/>			
Determine Total Available Catch-up	6.	Complete the table for each year you were eligible to participate in a 457(b) plan. First, enter your gross compensation. Then multiply by the figure shown to determine your Maximum Deferral. Enter the lesser of your Maximum Deferral and the Contribution Limit. Enter your Actual 457(b) Deferral (including employer paid portions). Finally, subtract your Actual 457(b) Deferral from the Lesser of Maximum Deferral and Contribution Limit and enter in line 6 (if the result is less than 0 enter 0). This is your Unused Amount. *Note that for years 2001 and prior, the Actual 457(b) Deferral Amount also includes deferrals to 403(b) and 401(k) plans.						
		Gross Compensation	Maximum Deferral	Contribution Limit	Lesser of Max. Deferral and Contribution Limit	Actual 457(b) Deferral Including Employer Paid		
		Year						
		2001*	<input style="width:100px;" type="text"/> x .33 =	<input style="width:100px;" type="text"/>	\$8,000.00	<input style="width:100px;" type="text"/>	<input style="width:100px;" type="text"/>	6a. <input style="width:100px;" type="text"/>
		2002	<input style="width:100px;" type="text"/> x 1 =	<input style="width:100px;" type="text"/>	\$11,000.00	<input style="width:100px;" type="text"/>	<input style="width:100px;" type="text"/>	6b. <input style="width:100px;" type="text"/>
		2003	<input style="width:100px;" type="text"/> x 1 =	<input style="width:100px;" type="text"/>	\$12,000.00	<input style="width:100px;" type="text"/>	<input style="width:100px;" type="text"/>	6c. <input style="width:100px;" type="text"/>
		2004	<input style="width:100px;" type="text"/> x 1 =	<input style="width:100px;" type="text"/>	\$13,000.00	<input style="width:100px;" type="text"/>	<input style="width:100px;" type="text"/>	6d. <input style="width:100px;" type="text"/>
		2005	<input style="width:100px;" type="text"/> x 1 =	<input style="width:100px;" type="text"/>	\$14,000.00	<input style="width:100px;" type="text"/>	<input style="width:100px;" type="text"/>	6e. <input style="width:100px;" type="text"/>
		2006	<input style="width:100px;" type="text"/> x 1 =	<input style="width:100px;" type="text"/>	\$15,000.00	<input style="width:100px;" type="text"/>	<input style="width:100px;" type="text"/>	6f. <input style="width:100px;" type="text"/>
		2007	<input style="width:100px;" type="text"/> x 1 =	<input style="width:100px;" type="text"/>	\$15,500.00	<input style="width:100px;" type="text"/>	<input style="width:100px;" type="text"/>	6g. <input style="width:100px;" type="text"/>
	2008	<input style="width:100px;" type="text"/> x 1 =	<input style="width:100px;" type="text"/>	\$15,500.00	<input style="width:100px;" type="text"/>	<input style="width:100px;" type="text"/>	6h. <input style="width:100px;" type="text"/>	
	2009	<input style="width:100px;" type="text"/> x 1 =	<input style="width:100px;" type="text"/>	\$16,500.00	<input style="width:100px;" type="text"/>	<input style="width:100px;" type="text"/>	6i. <input style="width:100px;" type="text"/>	
	2010	<input style="width:100px;" type="text"/> x 1 =	<input style="width:100px;" type="text"/>	\$16,500.00	<input style="width:100px;" type="text"/>	<input style="width:100px;" type="text"/>	6j. <input style="width:100px;" type="text"/>	
	2011	<input style="width:100px;" type="text"/> x 1 =	<input style="width:100px;" type="text"/>	\$16,500.00	<input style="width:100px;" type="text"/>	<input style="width:100px;" type="text"/>	6k. <input style="width:100px;" type="text"/>	
	7.	Sum lines 6a through 6k and enter the result in line 7.			7. <input style="width:100px;" type="text"/>			
	8.	If you were employed by a community college and eligible to participate in a 457(b) plan prior to 2001, follow the same format as question 6 above for years prior to 2001 on a separate paper and enter the total catch-up amount not used during pre-2001 years in box 8. Otherwise enter \$0 in box 8.			8. <input style="width:100px;" type="text"/>			
	9.	Sum lines 7 and 8. This is your total available 457(b) Final Three Year Catch-up.			9. <input style="width:100px;" type="text"/>			
Determine Amount of Catch-up Previously Used	10.	Enter the amount of Previously Utilized 457(b) Final Three Year Catch-up contributions if any. Determine the lesser of your Previously Utilized Catch-up and the Maximum Catch-up. Sum the amounts and enter in box 10. You are only eligible to utilize Final Three Year Catch-up for three consecutive years. Therefore, if you are eligible to utilize the catch-up this year you should not have utilized any prior to 2010.						
			Previously Utilized Catch-up	Maximum Catch-up	Lesser of Previously Utilized Catch-up and Maximum Catch-up			
		2010	<input style="width:100px;" type="text"/>	\$16,500.00	<input style="width:100px;" type="text"/>	10. <input style="width:100px;" type="text"/>		
		2011	<input style="width:100px;" type="text"/>	\$16,500.00	<input style="width:100px;" type="text"/>			
			Total	<input style="width:100px;" type="text"/>				
Determine Available Catch-up for 2012	11.	Subtract line 10 from line 9.			11. <input style="width:100px;" type="text"/>			
	12.	Enter the lesser of \$16,500 or the amount in line 11. This is your available 457(b) Final Three Year Catch-up for 2012. Also enter this amount in line 3 of the 457(b) section of Part 1 (first page) of this form.			12. <input style="width:100px;" type="text"/>			

Upon completion, submit the original form to your district payroll office and fax a copy to (800) 597-8206.

FBC Transfer In / Rollover In Request Form



Fringe Benefits Consortium

Employee Instructions	The FBC Transfer In / Rollover In Request Form is to be used to Transfer, Exchange or Rollover eligible retirement plan assets to the FBC Nationwide Retirement Program. Please complete all of the steps outlined below. Upon completion of this form, please fax a copy to (800) 597-8206.		
Step 1	Participant Name	Social Security Number	
Employee Information	Participant Mailing Address <small>(Street)</small>	E-Mail Address	
	<small>(City, ST ZIP)</small>	Home Phone Number	Work Phone Number
	School District (Employer)	Name of Retirement Specialist / Financial Representative	
Step 2	Please complete the following:		
Prior Account Information	<input type="checkbox"/> 100% Account Transfer Estimated Account Value \$ _____ <input type="checkbox"/> Partial Account Transfer Partial Transfer Amount \$ _____ or _____ % Type of account being transferred: <input type="checkbox"/> 401(a) <input type="checkbox"/> 403(b) <input type="checkbox"/> 457(b) <input type="checkbox"/> Other: _____		
	Prior Vendor Name	Prior Vendor Phone Number	
	Prior Vendor Address <small>(Street)</small>	Account Number of Account Being Transferred	
	<small>(City, ST ZIP)</small>		
Step 3	Please complete the following:		
Prior Plan Information	<input type="checkbox"/> Yes <input type="checkbox"/> No Were the assets, which are being transferred, accumulated under a 403(b) or 457(b) Plan other than your current employer's 403(b) or 457(b) Plan? If "Yes", answer the following questions. If "No" continue to step 4:		
	<input type="checkbox"/> Yes <input type="checkbox"/> No Are the assets subject to any other distribution restrictions?		
	If "yes", please explain: _____		
	Name of Prior Employer: _____ Date of Termination: _____ *Check with your Previous Employer		
Step 4	The transferred assets will be deposited into your Nationwide account and invested according to your existing account allocations unless you specify other allocations below.		
Asset Allocation	Specific Fund Allocations:		
	_____	_____	%
	_____	_____	%
Step 5	By executing this form I hereby direct the investment provider identified on this form to liquidate the designated amount of the indicated account and to transfer the proceeds to my San Diego County Schools Fringe Benefits Consortium (FBC) 403(b)/457(b) Custodial Account, except to the extent my current employer or any of my former employers prohibits transferability. In the event of such prohibition, I hereby direct said investment provider to retain the nontransferable portion of my account in a separate account or contract and to transfer the remainder.		
Employee Approval	Employee Signature	Date	
	X		
Custodian Approval	Authorized Representative Signature	Date	
	X		
Vendor Instructions	Please provide the following information: 1. Account Balance as of 12/31/88; Post-1988 Contributions 2. Account Balance as of 12/31/86 3. Dollar Amount Breakdown by Each Money Type 4. FBO, Social Security Number, and Account Number 196-80051	Mail to: Fringe Benefits Consortium c/o National Benefit Services LLC P.O. Box 6980 West Jordan, UT 84084	Make Checks Payable To: Nationwide Trust Co.

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