



- Use this form to transfer assets from your employer's 457 plan with MissionSquare Retirement (MissionSquare plan) to the full-time 457 Deferred Compensation Plan with Voya Financial once you have become a full-time employee.

IMPORTANT INFORMATION

Direct transfers of assets from the VantageTrust PLUS Fund, a stable value fund, to a competing investment option are prohibited. Competing investment options may include, but are not limited to, money market funds, short-term bond funds, CD Accounts or other certificate of deposit programs, other stable value funds, and a self-directed brokerage account.

OTHER TRANSFER REQUESTS

This form should only be used to transfer assets from your ICMA-RC 457 plan to the 457 plan offered through Voya Financial. For all other requests, please contact MissionSquare at 800-669-7400 or login to your account online at www.icmarc.org/lapsp.

Fax or mail completed form to MissionSquare:

FAX:

MissionSquare Retirement
Attn: Workflow Management Team
(202) 682-6439

MAIL:

MissionSquare Retirement
Attn: Workflow Management Team
P.O. Box 96220
Washington, DC 20090-6220

FORM INSTRUCTIONS

If you need assistance as you read the instructions and complete the form, please contact MissionSquare.

1. **Participant Information:** Please complete all of the information in Section 1 of the form. This will help to ensure your request is processed in a timely manner.
2. **Transfer From: MissionSquare Account:** Prefilled. No changes to this section.
3. **Transfer To: Account Information:** Prefilled with Voya Financial information. No changes to this section.
4. **Transfer Amount:** Please specify whether you wish to transfer your total account balance or a partial transfer of a specific dollar amount.
5. **VantageTrust PLUS Fund Assets:** Please review this section since you are invested in the VantageTrust PLUS Fund.
6. **Participant Signature:** Please sign and date the form.
7. **Employer Signature:** Please obtain employer signature prior to submitting to MissionSquare.



- Use this form to transfer assets from your MissionSquare Retirement 457 plan to the full-time 457 Deferred Compensation Plan with Voya Financial offered through your employer. Do not use this form for a roll-in request.

1 PERSONAL INFORMATION

FULL NAME OF PARTICIPANT: <small>LAST, FIRST, MI</small>			MARITAL STATUS: <input type="checkbox"/> MARRIED <input type="checkbox"/> SINGLE	
SOCIAL SECURITY NUMBER	DATE OF BIRTH: <small>MM/DD/YYYY</small>	PREFERRED PHONE NUMBER:	EMAIL ADDRESS:	
MAILING ADDRESS:				
<small>STREET</small>		<small>CITY</small>	<small>STATE</small>	<small>ZIP</small>

2 TRANSFER FROM: MISSIONSQUARE ACCOUNT

MissionSquare 457 Plan Account Number: 307490	Employer Plan Name: City of Los Angeles (PSP)
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3 TRANSFER TO: ACCOUNT INFORMATION

Employer Plan Name: **City of Los Angeles Deferred Compensation Plan**
 Provider's Name: **Voya Financial**
 Provider's Plan Address: **Attn: City of Los Angeles Deferred Compensation Plan
 P.O. Box 990071, Hartford, CT 06199**

4 TRANSFER AMOUNT

I wish to liquidate and transfer:

- Total account balance (100%)
- Partial transfer of \$ _____

5 VANTAGETRUST PLUS FUND ASSETS

A transfer from the VantageTrust PLUS Fund to an investment option(s) offered by another provider requires verification that it meets VantageTrust PLUS Fund investment contract provisions, as further described below. This section serves to verify that the transfer meets such provisions.

Direct transfers of assets from the VantageTrust PLUS Fund are only permitted to non-competing funds/options, and those monies must stay in non-competing funds/options for at least 90 days before they are moved to a competing fund/option.

Examples of competing funds/options include, but are not limited to:

- cash funds, money market mutual funds, bank accounts or certificates of deposit.
- stable value funds or substantially similar investment options that offer guarantees of principal or income, such as guaranteed annuity contracts or similar arrangements with financial institutions
- short-term bond funds that invest in fixed income securities and seek to maintain or have an average portfolio duration of less than three years
- any investment option that invests 80% or more of its assets in (i) fixed income securities or funds with a duration of less than three years, or (ii) instruments that seek to provide capital preservation such as stable value funds, bank certificates of deposit or bank accounts, and cash or cash equivalents.
- a self-directed brokerage account.

By signing this form, I acknowledge that I have read and agree to the terms and conditions set forth above and hereby confirm that I will reinvest the assets being transferred from the VantageTrust PLUS Fund only into a non-competing fund/option(s) offered through my plan for a period of at least 90 days prior to transferring VantageTrust PLUS Fund proceeds to a competing fund option.



EMPLOYER PLAN NUMBER:
307490

SOCIAL SECURITY NUMBER:

FULL NAME OF PARTICIPANT:

6 PARTICIPANT SIGNATURE

By signing this form, I acknowledge that I have received and reviewed the *Special Tax Notice Regarding Plan Payments*, and the additional disclosures contained in the form instructions, and I direct MissionSquare Retirement to process the transfer specified on this form. As required by law and under the penalty of perjury, I certify that the Social Security Number (Tax Identification Number) I have provided is correct.

Participant Signature: _____

Date: MM/DD/YYYY _____

I am a U.S. citizen: Yes No

7 EMPLOYER SIGNATURE (FOR EMPLOYER USE)

By signing, the employer confirms the participant is eligible to transfer assets from the MissionSquare Retirement 457 plan to the plan designated in Section 3.

NO TERMINATION DATE REQUIRED

Authorized Employer Official's Signature: _____

Date: MM/DD/YYYY _____

Authorized Employer Official's Name and Title (Please Print): _____