



IN-PLAN ROLLOVER TO DESIGNATED ROTH ACCOUNT

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1. PARTICIPANT INFORMATION

Participant: _____ Traditional Account Number: _____

SSN: _____ Birth Date: _____ Phone: _____

Address: _____ City: _____ State: _____ ZIP: _____

2. CONVERSION FROM A TRADITIONAL 401(k) TO A ROTH 401(k)

CHECK ONLY ONE and fill in where applicable

Choose one of the following:

New Conversion: This is a conversion to a NEW Roth Qualified Plan.

Existing Roth 401(k) Qualified Plan: This is a conversion to an EXISTING Roth Qualified Plan. Roth Qualified Plan Account Number: _____

Choose one of the following:

Full Conversion: Convert all assets held in the above account.

Partial Conversion: Convert the assets indicated below.

Asset Description	Indicate Amount (do not use percentages)

3. SIGNATURE OF THE ROTH 401(k) PARTICIPANT

The undersigned hereby irrevocably elects, pursuant to IRC Section 402A(c)(4)(E) to treat this contribution as an In-Plan Rollover to a Designated Roth Account. I acknowledge that, due to the complexities involved in the tax treatment of In-Plan Rollovers under an employer's plan, the Administrator has recommended that I consult with my tax advisor or the IRS before completing this transaction to make certain that this transaction qualifies as a valid contribution and is appropriate in my individual circumstances. I understand that these transactions are reported to the IRS and I acknowledge that I am responsible for record keeping Designated Roth Account contribution information as directed by the IRS. I understand and acknowledge that In-Plan Roth Rollovers are IRREVERSIBLE.

Signature of Participant: _____ Date: _____