

SERB NATIONAL FEDERATION — Српски Народни Савез

Request for Transfer of Funds *(please check appropriate boxes)*

Request is for a - New Contract, or Existing Contract - Estimated Transfer value \$ _____

Type: Non-Qualified (1035 Exchange) or Non-1035 Exchange Mutual Fund Bank CD Other _____

or: Qualified Direct Transfer (TSA to TSA or IRA to IRA), Direct Rollover (401(k) to IRA), Non Direct Rollover

Is this transfer from an employer plan under ERISA guidelines? Yes or No

Owner's Name:

First Name MI Last Name Phone Number

Street Address City State Zip code

Social Security Number Date of Birth

Current Trustee or Insurance Company:

Name of Current Trustee Phone Number

Street Address City State Zip Code

Name of Contract Owner SS# Contract/Account Number

Transfer Instructions:

Complete Transfer - **Liquidate and Transfer ALL assets in my account**, Partial Transfer - **Liquidate and Transfer assets totaling \$** _____
From _____ fund # _____

Please make this transfer effective:

Immediately or Upon Maturity Date (mm-dd-yyyy) ____ - ____ - _____

Contract Status: Current estimated value of contract: \$ _____. Please enclose your contract. If your contract has been lost or destroyed, please check below.

I certify that my contract has been lost or destroyed. In addition, I certify that the contract has not been assigned or pledged as collateral.

1035 Exchanges

I, the Owner, assign and transfer to the Serb National Federation (SNF) all rights, interests and benefits in the current contract for the sole purpose of effecting an exchange under the Section 1035 of the Internal Revenue Code. I represent and warrant that the current contract is not subject to any lien or encumbrance, nor is it subject to any legal proceedings of any kind, including bankruptcy, and that I am responsible for continuing premium payment of the current contract (if necessary to keep the contract in force) until the surrendering company mails the contract funds to the SNF. I further agree that the SNF is not responsible for any surrender charge or fees of any kind owed the surrendering company.

All Other Transfers

As the owner of the account referenced, I request the transfer to the Serb National Federation as sponsor, issuer and carrier of any annuity contract. I have submitted an application to the Serb National Federation to establish an account for the purpose of this transaction. I request that the surrendering company immediately complete the transfer, exchange, or rollover. Please do not withhold an amount for taxes from the proceeds.

Signatures

Owner's Signature Date

Joint Owner's Signature Date

Accepted by: SNF Officer Signature Date

Please make your check payable to:

SERB NATIONAL FEDERATION
615 Iron City Drive
Suite 302
Pittsburgh, PA 15205