

SCREEN ACTORS GUILD-PRODUCERS PENSION & HEALTH PLANS

DIRECT ROLLOVER INSTRUCTIONS TO THE TRUSTEE

NOTICE: In all cases, the check for the Partial Lump Sum payment must be negotiable only by the Trustee of the IRA or qualified retirement plan. The IRA regulations require that, if the benefit is to be rolled over to an IRA, the check must specifically name the trustee. For example, if John Smith is eligible for, and elects a direct rollover of his benefits to an IRA with ABC Bank as the Trustee, the payee line of the check must read: ABC Bank, Trustee fbo John Smith IRA Rollover A/C 0000000000.

If the qualified retirement plan receiving a direct rollover is not an IRA, the check does not need to name the specific Trustee, but must name the retirement plan and the participant: e.g., “Trustee of XYZ Savings Plan fbo John Smith.”

Make Check Payable to: _____

Account Number: _____

Mailing Address

Address

City State Zip

P.O. BOX 7830 · BURBANK, CA 91510-7830
(818) 954-9400 · PENSION FAX (818) 973-4467 · (800) 777-4013 (EXCLUDES LOS ANGELES AREA)