

# PURCHASE OF SERVICE CREDIT TRANSFER



OHIO DEFERRED  
COMPENSATION

Participants may use all or a portion of their Ohio Deferred Compensation Program account balances as a direct trustee-to-trustee transfer to a governmental pension system that permits the purchase of permissive service credit or the repayment of service credits.

To request a transfer, a participant must complete this form and attach an unexpired copy of the cost statement from the pension system. Forms submitted without a copy of this statement will not be processed. The pension system cost statement will document the exact amount needed to purchase service credit. The direct transfer from a Program account cannot exceed the amount required.

## Participant Authorization

I authorize the direct transfer of funds from my Ohio Deferred Compensation account below to purchase service credit with  OPERS  STRS  SERS  OP&F  HPRS  CRS, and agree to follow the rules of my pension system regarding purchase of service credit.

The maximum amount of transfer I authorize is \$\_\_\_\_\_. If no amount is indicated, a transfer not exceeding the cost indicated by the pension system or the entire Program account balance, whichever is less, will be made. The Program is not responsible for changes in the account value prior to the distribution. If I have money in more than one investment option, the direct transfer will be made on a pro-rata basis, unless a single investment option is selected. If sufficient funds do not exist for the single investment option, the transfer will be automatically made on a pro-rata basis.

Single Investment Option Selection: \_\_\_\_\_ (optional)

\_\_\_\_\_  
Last Name First M.I.

XXX-XX-

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Social Security Number (last 4)

\_\_\_\_\_  
Employer Name

\_\_\_\_\_  
Employer Code

\_\_\_\_\_  
Suffix

\_\_\_\_\_  
Participant Signature

\_\_\_\_\_  
Date

**ATTACH A COPY OF THE PENSION SYSTEM COST STATEMENT TO THIS FORM AND RETURN TO  
OHIO DEFERRED COMPENSATION, 257 EAST TOWN STREET, SUITE 457, COLUMBUS, OHIO 43215-4626**

## Ohio Deferred Compensation Acceptance

This request for a purchase of service credit transfer has been processed. A check in the amount of \$\_\_\_\_\_ Amount Sent  
was sent to the pension system indicated on \_\_\_\_/\_\_\_\_/\_\_\_\_\_.  
Date

- NOTES:
- Participants are responsible to make arrangements with the pension system for any balances due if the account value on the transfer date is less than cost statement amount.
  - Transfer requests must be processed by the pension system before the cost statement due date to avoid additional interest. To ensure processing by month end, forms should be received by the Program no later than the 15th of the month.

**If you have any questions about this form, please call our Service Center at 877-644-6457.**