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The State of Iowa's 401(a) Employer Match Plan  
**ROLLOVER INSTRUCTIONS**

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To roll your vested account balance from another Qualified Retirement Plan or IRA into The State of Iowa's 401(a) Employer Match Plan, please review the instructions listed below.

1. Contact the prior plan representative or custodian and request a distribution. Complete the forms they send you and return them to your prior plan representative for processing.
2. Indicate on the form that the check\* should be made payable to:

***Mid Atlantic Trust Company***

FBO: (Your Name)

**Acct. # PAD0311**

\*Please note: Taxes should not be withheld on your distribution because the funds will be transferred into a Qualified 401(k) plan. A tax code "G" should appear on your 1099-R

3. Mail to: P&A Retirement Plan Services, Inc.  
17 Court Street, Suite 300  
Buffalo, New York 14202-3294

If you are rolling your qualified IRA into the plan, please send a copy of your last statement with the check.