

# Rollover Contributions

## A Guide to Transferring Annuity Accounts from a United Brotherhood of Carpenters and Joiners of America Sponsored Annuity Plan “UBC Annuity Plan” to the St. Louis-Kansas City Carpenters Regional Annuity Fund “STL-KC Annuity Fund”

If you want to consolidate your UBC Annuity Plan(s) retirement benefits account balance(s) you have in a tax qualified UBC Annuity Plan, you may be able to transfer balances into your current account STL-KC Annuity Fund or “Annuity Fund”. Please follow the instructions below. Note that the UBC Plan must allow for direct rollovers. Additionally, the plan representative of the UBC Plan (“Plan Representative”) must sign the completed rollover contribution form.

Follow these steps to directly transfer your UBC Plan accounts to the Annuity Fund:

**1. Confirm that the Annuity fund accepts the type of retirement account you wish to roll over.**

---

For confirmation that (i) the Annuity Fund accepts direct rollover of the UBC Plan benefits you want to rollover, and (ii) you are eligible to contribute to the Annuity Fund, please contact the Benefits Office at (877)232-3863.

**2. Contact the UBC Plan that currently holds the benefits you want to roll over and confirm direct rollover is permitted.**

---

Inform the UBC Plan that you would like a direct cash rollover of the retirement account balance into your qualified retirement account with the Annuity Fund. Then, request that the UBC issue a check made payable to the Trustees of the St. Louis-Kansas City Carpenters Regional Annuity Fund for the benefit of you (see example) and that it be mailed to the Annuity Fund. Wire instructions available upon request.

*Example: If your name is Jane Smith, the check is made payable to the Trustees of the St. Louis-Kansas City Carpenters Regional Annuity Fund FBO Jane Smith.*

The UBC Plan Representative should directly mail the attached form and check to:

**Mid-America Carpenters Regional Benefit Services**

Attn: Retirement Services

1419 Hampton Ave, St. Louis, MO 63139

---

**Need help? Call Retirement Services: 1-877-232-3863**

---

### Important Information Before You Begin

On the **Rollover Contributions Authorization Form** (see reverse side of this form), provide the name of the UBC Plan from which the funds will be transferred, the name of the UBC Plan Representative completing the form, the name of the participant, and the social security number of the participant.

Each rollover contribution must be accompanied by this form, duly completed and signed by both the participant and an authorized UBC Plan Representative. Rollover amounts will not be invested in your Annuity Fund account unless accompanied by such form.

The rollover contribution will be invested according to the terms and conditions of the Annuity Fund’s Plan Document.

