

1 PARTICIPANT INFORMATION

LAST NAME	FIRST NAME	MI	SS#	DOB
ADDRESS			CITY	STATE
EMAIL			PHONE	

2 WITHHOLDING INFORMATION

An eligible rollover distribution constitutes any distribution to the Vista 401(k) plan from another qualified plan. Qualified plans include 401(k), 401(a), 403(b), traditional IRAs, 457, and pension plans. If you do not have a Vista 401(k) account you will also need to complete a Vista 401(k) enrollment form or enroll online at www.vista401k.com.

An eligible rollover distribution does not include any of the following:

- Any distribution that is one of a series of substantially equal periodic payments made over any one of the following periods: The life of the employee; the joint lives of the employee and the designated beneficiary, the expectancy of the employee; the joint life expectancy of the employee and the designated beneficiary; or a specified period of 10 years or more.
- A distribution required by the minimum distribution rules.
- Any portion of the distribution that cannot be included in gross income.
- Refunds of 401(k) elective deferrals or excess Section 415 annual additional limitations.
- Corrective distributions of excess contributions excess deferrals and excess aggregate contributions.
- Loans in default that are deemed distributions.
- Any other such item as designated by the IRS.
- After-tax money.

3 YOUR ROLLOVER

Amount of the rollover: \$ _____ Name of qualified plan rollover is from: _____

Please have the plan administrator make the check payable to: **Newport Trust FBO Vista 401(k)**. Memo Field: [participant name] ACCT a11684

4 INVESTMENT ELECTIONS

Your selections must equal 100% and be in whole numbers. You must select only 1 of the 2 options listed below. If you wish to change your account's present allocations you must go online and perform such a request or contact us for an investment change form. This form only directs the investment of rollover monies.

1 TARGET DATE RETIREMENT FUNDS

American Funds 20__ (2020, 2025, 2030, 2035, 2040, 2045, 2050, 2055, 2060, 2065)

2 SELECT YOUR OWN FUND(S)

American Century Inflation-Adjusted Bond	_____ %	Standard Insurance Guaranteed FI VI	_____ %
American Funds EuroPacific Growth	_____ %	T. Rowe Price Blue Chip Growth	_____ %
Blackrock U.S. Government Bond	_____ %	Vanguard Balanced Index	_____ %
Fidelity International Index	_____ %	Vanguard Institutional Index Fund	_____ %
JP Morgan Equity Income Fund	_____ %	Vanguard Mid-Cap Index Fund	_____ %
Lord Abbott Total Return	_____ %	Vanguard Small-Cap Index Fund	_____ %
		TOTAL	_____ %

Disclosure for how funds rolled into the plan will be invested: Amounts rolled into the Plan will be invested based on how your contributions are currently being allocated or, if none, will be invested in the default investment fund in accordance with the terms of the service agreement. You can transfer amounts invested in the default fund into different funds or change current investment elections by logging into your account at www.vista401k.com.

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SIGNATURE

I request to make a direct rollover to the Vista 401(k) Plan. I certify that all of the above information is true and correct. I would like to have the check deposited into my account as soon as administratively feasible. I understand that the program, as described in the Vista 401(k) plan document, will govern all cases.

By signing the request, I certify that the above amount is part, or all, of an eligible rollover distribution, and that the above amount was distributed from a qualified plan.

SIGNATURE: _____

DATE: _____

 **We cannot process your rollover until we have this completed form, as well as the rollover check.**