

# Savings Banks Employees Retirement Association

## Employer Stock Transfer Form

Employee Name:	SBERA Employer Member Plan No.
Employee Name:	SBERA Certificate No.
Social Security Number:	Date of Birth

**Choose One of the following options and indicate the appropriate percentage**

**A. Directions to TRANSFER FROM the Employer Stock Account**

Indicate the whole percentage to be transferred out of the Employer Stock Account \_\_\_\_\_%.

Indicate by whole percentage the amount to be transferred into the following accounts.

Total in this section must equal 100%.

<u>Conservative</u>	<u>Aggressive</u>	<u>Asset Allocation</u>
_____ % Money Market Account	_____ % Employer Stock (If applicable)	_____ % LifePath Retirement
_____ % Bond Account	_____ % Index 500 Account	_____ % LifePath 2020 Account
_____ % All Asset Account	_____ % International Equity Account	_____ % LifePath 2025 Account
	_____ % Large Cap Growth Account	_____ % LifePath 2030 Account
<b><u>Moderate</u></b>	_____ % Large Cap Value Account	_____ % LifePath 2035 Account
_____ % SBERA Account	_____ % Small Cap Growth Account	_____ % LifePath 2040 Account
_____ % Equity Account	_____ % Small Cap Value Account	_____ % LifePath 2045 Account
		_____ % LifePath 2050 Account
		_____ % LifePath 2055 Account

\*If the percentages indicated do not equal 100%, the difference will be allocated to the Plan Default Account. The participant is responsible for transferring any balances out of the Plan Default Account and changing future contribution instructions.

**B. Directions to TRANSFER TO the Employer Stock Account**

Indicate the whole percentage to be transferred from one or more of the following accounts into the Employer Account \_\_\_\_\_%.

<u>Conservative</u>	<u>Aggressive</u>	<u>Asset Allocation</u>
_____ % Money Market Account	_____ % Employer Stock (If applicable)	_____ % LifePath Retirement
_____ % Bond Account	_____ % Index 500 Account	_____ % LifePath 2020 Account
_____ % All Asset Account	_____ % International Equity Account	_____ % LifePath 2025 Account
	_____ % Large Cap Growth Account	_____ % LifePath 2030 Account
<b><u>Moderate</u></b>	_____ % Large Cap Value Account	_____ % LifePath 2035 Account
_____ % SBERA Account	_____ % Small Cap Growth Account	_____ % LifePath 2040 Account
_____ % Equity Account	_____ % Small Cap Value Account	_____ % LifePath 2045 Account
		_____ % LifePath 2050 Account
		_____ % LifePath 2055 Account

\*If the percentages indicated do not equal 100%, the difference will be allocated to the Plan Default Account. The participant is responsible for transferring any balances out of the Plan Default Account and changing future contribution instructions.

**Participant Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Human Resources Representative Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

SBERA Use only Date Rec'd:

Date Entered:

By: