

**Chicago Public Schools 403(b) & 457(b)  
Intra-Plan Transfer Form**

Group ID# 01160001 & 01160003

**IMPORTANT INFORMATION AND GUIDELINES**

Thank you for your participation in the Chicago Public Schools (CPS) Deferred Compensation Savings Plans.

Please use this form if you wish to transfer existing plan balances from VOYA, Empower or previous CPS 403(b) and/or 457(b) retirement plan legacy providers (MetLife, Hartford, Horace Mann, Equitable, Lincoln Investment Planning and Security Benefit) directly into the new CPS mutual fund investment platform with VRSCO. Please complete a separate form for each provider that you desire to transfer to the new CPS mutual fund investment platform.

Prior to making the important decision on directing your legacy retirement plan account balance to the new CPS mutual fund investment platform, you should:

- Understand your current contract provisions: You may contact your current service provider to understand your current contract provisions, interest rates, applicable surrender charges and/or fees associated with your account.
- Understand the benefits associated with transferring account balances to the new investment arrangement for the Plans. For more information on the new investment arrangement for the CPS mutual fund investment platform, please call Client Care Center (1-800-448-2542) or contact your assigned Plan Consultant as listed on your statement or online. Their role includes assisting you with understanding the new investment arrangement, and the process required for a transfer. It does not include making a recommendation between the options available to you. That is something you will need to do before deciding whether to initiate the transfer.
- Have an active Chicago Public Schools account on the mutual fund investment platform prior to transferring from a legacy provider. For assistance in establishing a new account you may call 1-888-569-7055, Monday through Friday, 7:00 a.m. to 7:00 p.m. (CT), to speak with an enrollment specialist.
- Address any outstanding loans in the account before requesting a transfer. If you currently have an outstanding or defaulted loan, you may:
  - ◇ Transfer the non-loan balance by completing this form, then transfer the remaining account balance once the loan is repaid by completing another instance of this form.
  - ◇ Pay off the loan prior to surrendering your contract(s)/certificates(s) and proceed with this form; or
  - ◇ Wait to complete this form retaining the loan balance with the legacy provider and upon repayment of the loan, transfer the account to the new CPS mutual fund investment platform.
- Understand that once your account balance(s) is transferred to the new CPS mutual fund investment platform, you cannot transfer the account balance(s) back to the previous investment platform.

Lastly, there are two steps required to complete your transfer:

1. Complete and return the attached Chicago Public Schools 403(b) & 457(b) Intra-plan transfer form. Please use a separate form for each provider relationship accounts that you are transferring to the new CPS mutual fund investment platform.
2. Contact your previous provider to obtain any necessary form(s) to direct the associated account balance transfer to the new CPS mutual fund investment platform.

For additional information about the Plans, please call Client Care Center at call 800-448-2542, Monday through Friday, 7:00 a.m. to 7:00 p.m. (CT) or visit [corebridgefinancial.com/retire](http://corebridgefinancial.com/retire).

We appreciate the opportunity to serve your CPS Retirement Plan needs and to help you become FutureFIT®.

**KEEP A COPY OF THE COMPLETED FORM FOR YOUR RECORDS**

Once completed, signed and dated, this form should be returned for processing using the information below:

Email submission: [transactions@corebridgefinancial.com](mailto:transactions@corebridgefinancial.com)

Fax submission: 1-877-202-0187

Mail submission:

Retirement Services Center  
P.O. Box 15648  
Amarillo, TX 79105-5648

If overnight delivery: Retirement Services Center  
1050 N. Western St.  
Amarillo, TX 79106-7011

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Group ID# 01160001 & 01160003



VALIC Retirement Services Company (VRSCO)

1. PARTICIPANT INFORMATION

Name: \_\_\_\_\_ SSN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_
Personal Email Address: \_\_\_\_\_ Work Email Address: \_\_\_\_\_
Daytime Phone Number: (\_\_\_\_) \_\_\_\_\_

2. ACCOUNT & TRANSACTION INFORMATION

Choose the name of your transferring provider. Please complete a separate form for each provider.

- Voya Requested Plan Type: 403(b) 457(b)
Empower Requested Plan Type: 403(b) 457(b)
Other Carrier Requested Plan Type: 403(b) 457(b)

Indicate the "From" provider account number. VRSCO will provide the "To" account number.

- 1. "From" Provider Account #: \_\_\_\_\_ "To" Account #: \_\_\_\_\_ Estimated Transfer: \$ \_\_\_\_\_
2. "From" Provider Account #: \_\_\_\_\_ "To" Account #: \_\_\_\_\_ Estimated Transfer: \$ \_\_\_\_\_
3. "From" Provider Account #: \_\_\_\_\_ "To" Account #: \_\_\_\_\_ Estimated Transfer: \$ \_\_\_\_\_
4. "From" Provider Account #: \_\_\_\_\_ "To" Account #: \_\_\_\_\_ Estimated Transfer: \$ \_\_\_\_\_
5. "From" Provider Account #: \_\_\_\_\_ "To" Account #: \_\_\_\_\_ Estimated Transfer: \$ \_\_\_\_\_

3. ACCEPTANCE OF TRANSFER

In accepting the cash value transferred from \_\_\_\_\_ (Name of Transferring Company/Carrier) within the above described Plan, Trustee/Custodian hereby assumes responsibility for the future administration of such funds and agrees that payment to and receipt by Trustee/Custodian of the cash value shall fully discharge \_\_\_\_\_ (Name of Transferring Company/Carrier) from all responsibility and liability that may accrue with respect to such funds after the transfer.

Trustee/Custodian \_\_\_\_\_ Date \_\_\_\_\_
CEO and Trust Officer, VALIC Trust Company Inc.

4. CHECK AND MAILING INFORMATION

- A. Make Transfer payable as follows: VRSCO on behalf of Trustee/Custodian FBO: \_\_\_\_\_ (client name) VALIC Retirement Services Company Group ID #: 01160
B. Mail check to: VALIC Retirement Services Company C/O JP Morgan Chase P.O. Box 301465 Dallas, TX 75303-1465
C. Mail overnight check to: JP MORGAN CHASE (TX1-0029) VALIC Retirement Services Company Lockbox number 301465 14800 Frye Road Fort Worth, TX 76155

5. CLIENT AUTHORIZATION TO ESTABLISH ACCOUNT AND TRANSFER FUNDS

By signing on the Client Signature line below the undersigned agrees, in the event his/her transaction is not complete, to permit VRSCO to retain his/her funds while VRSCO immediately attempts to obtain the information necessary and/or correct any other issues in order to complete the transaction contemplated. I authorize the above transfer and certify that all statements are complete and accurate to the best of my knowledge and belief. I understand that VRSCO and its affiliates are authorized to provide only education and guidance, and not recommendations or advice, and I acknowledge that I have read and understand the important information contained herein and agree to these disclaimers.

Name \_\_\_\_\_ Client Signature \_\_\_\_\_ Date \_\_\_\_\_

VALIC Retirement Services Company is a wholly owned subsidiary of Corebridge Financial, Inc.