



Principal Life Insurance Company
 Des Moines, IA 50306-9394
 1-800-986-3343
 www.principal.com
 A member of the Principal Financial Group^o

Principal AdvantageSM Rollover Declaration

CTD 01314

Follow the steps below to roll funds into your employer's retirement plan.

Step 1 – Personal Information					
Plan Sponsor/Employer Name Partners in Community Supports		Plan ID 802579		Location Number	
Name (Last)	(First)	(Middle Initial)	<input type="checkbox"/> Male <input type="checkbox"/> Female	Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married	
Address (Street)		(City)	(State)	(ZIP Code)	Phone Number <input type="checkbox"/> AM <input type="checkbox"/> PM
Email Address					
Social Security Number		Date of Birth		Date of Employment	

Step 2 – Select Your Investment Election	
<p>Make your investment election(s) by showing the percentage you want directed to each investment option. The column must add up to 100%. This investment direction applies only to your rollover contribution. <i>If we receive the rollover contribution before receiving this completed form, the rollover contribution may be allocated based on your current investment election or the plan's default investment option.</i></p>	
Investment Option(s)	Rollover Contributions
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
Total	100%

Please Continue to Next Page

Step 3 – Rollover Information

The assets rolled over into this plan result from a distribution from a: (please check one)

- SIMPLE IRA 401(a) Qualified Plan (pre-tax contributions) 403(b) Plan
 IRA* (pre-tax contributions) Simplified Employee Pension Plan (SEP) Roth 401(k) Contributions
 Governmental 457 Plan 401(a) Qualified Plan (after-tax contributions)**

Name of Financial Institution (where funds were held)

Previous Plan/Account Name and Number

Amount of Pre-tax Distribution
\$

Amount of After Tax Distribution**
\$

Amount of Roth 401(k) Distribution
\$

Year 1st Roth 401(k) contribution was made

*After tax contributions from an IRA may not be rolled to an employer sponsored retirement plan.

**After tax contributions can only be rolled over as a direct Trustee to Trustee transfer.

You may rollover a distribution from an IRA into an eligible retirement plan other than an IRA if part of the rollover is considered to come first from amounts other than after-tax contributions in any of your traditional IRAs and the rollover is from an IRA with after-tax income and the pre-tax amounts in other IRAs are sufficient to cover any after-tax amounts included in the IRA.

An eligible retirement plan for these purposes means:

- Plans Qualified under 401(a) · 403 (a or b) Annuity · Governmental 457 plan

Step 4 – Request Rollover From Prior Financial Institution

· Contact the financial institution that currently holds your retirement funds to request a rollover.

· Instruct them to complete the rollover check as follows:

Checks must be made payable to:

Delaware Charter Guarantee & Trust Company (d.b.a. Principal Trust Company) as Trustee for Retirement Plan Clients.
FBO (Your name), Plan ID of the retirement plan at The Principal®

· Submit the rollover form and check.

Check sent directly to Principal Life:

- Mail or FAX the *Rollover Declaration form* to Principal Life.
· Instruct prior financial institution to send check to Principal Life.

Check sent to you or your current Plan Sponsor:

- Mail check along with the *Rollover Declaration form* to Principal Life.

Mail to: Principal Life Insurance Company

Fax to: 1-866-704-3481

P.O. Box 9394

Des Moines, IA 50306-9394

If you have questions or would like assistance in contacting the financial institution to obtain your rollover funds, please call our Client Contact Center at 1-800-547-7754.

Step 5 – Participant Signature/Declaration (Please sign below after you have completed the form.)

I may deposit only retirement funds that are allowed under my current employer's plan. I have verified with my current employer that these funds can be deposited according to plan provisions.

By signing below you declare this information is correct.

Participant Signature

X

Date

Step 6 – Plan Sponsor Signature (Please sign below after you have reviewed the form.)

Based on the information above, this rollover contribution is acceptable according to the plan provisions and directs Delaware Charter Guarantee & Trust as Trustee for Principal AdvantageSM clients to accept the enclosed amount as a rollover contribution and Principal Life Insurance Company to keep the appropriate records and accounts.

Plan Sponsor or Trustee Signature

X

Date

Redemption fees may apply on certain transactions. For further information on redemption fees, please visit The Principal Retirement Service Center® at www.principal.com.

Insurance products and plan administrative services are provided by Principal Life Insurance Company. Principal Investors Fund is distributed by and securities are offered through Princor Financial Services Corporation, 800-547-7754, member SIPC. Princor and Principal Life are members of the Principal Financial Group, Des Moines, IA 50392.

Before investing in mutual funds, investors should carefully consider the investment objectives, risks, charges and expenses of the funds. This and other information is contained in the free prospectus, which can be obtained from your local representative. Please read the prospectus carefully before investing.