



DIRECT TRUSTEE TO TRUSTEE TRANSFER

**FORM
105**
(Rev. 2022)

Purpose of the Form:

- Use this form to make direct trustee to trustee transfers.

Instructions:

- Complete in blue/black ink and return to CCCERA. Submit original document only; fax/email copies will not be accepted.
- CCCERA cannot accept a transfer that exceeds the cost to purchase the “permissive service credit”; and
- A transfer of ineligible funds to CCCERA may cause adverse income tax consequences, and CCCERA is not responsible for those tax consequences.
- A transfer is limited to the purchase of “permissive service credit.” Permissive service credit includes military service, prior public service credit, redeposit of previously withdrawn contributions, leave of absence, and time prior to membership.
- **To process the trustee-to-trustee transfer, this form must accompany any form(s) required by your Plan Sponsor.**

Member Information		
Full Name	Last 4 of Social Security Number	
Street or P.O. Box	Apt. #	
City	State	Zip Code

Source of Funding	
Name of Plan or Financial Institution	
I understand that the trustee-to-trustee transfer must be received in the Retirement Office no later than:	Date – mm/dd/yyyy
Member Signature	Date – mm/dd/yyyy

FOR RETIREMENT STAFF USE ONLY	
Type of Service	Years of Service Purchased
Tier Service Purchase to be credited to	Cost of Purchase
The trustee-to-trustee transfer must be received in the Retirement Office no later than:	Date – mm/dd/yyyy
I hereby certify that the service purchase is eligible for a trustee-to-trustee transfer and that the cost to purchase is correct as stated above.	
Signature of Retirement Counselor making certification	Date – mm/dd/yyyy