

TRSL Accepts Rollovers and Trustee-to-Trustee Transfers to Purchase Eligible Service Credit

Effective July 1, 1999, TRSL can accept a direct rollover or trustee-to-trustee transfer of eligible funds to purchase eligible service credit.

The member and current plan provider holding the funds must complete a *Rollover / Trustee-to-Trustee Transfer Acceptance* (Form 9R). This completed form must accompany the funds. If it does not, the funds will be returned and no service credit will be given.

All funds eligible for rollover/transfer into TRSL must be in the TRSL member's name.

Eligible funds are funds under one of the following sections of the Internal Revenue Code: 401(a), 401(k), 403(a), 403(b), 408(a), 408(b), or 457(b).

Effective January 1, 2002, TRSL will also accept funds from 403(b) accounts (tax sheltered annuities) and 457 accounts (deferred compensation) to purchase eligible service credit in accordance with the Economic Growth and Tax Relief Reconciliation Act (EGTRRA) of 2001.

The amount transferred cannot exceed the total cost of the purchase. If it does, the rollover/transfer check will be returned and no service credit will be issued.

If you have questions regarding funds eligible for rollover/transfer into TRSL, contact our office at (225) 925-6422.

Please complete Form 9R on reverse side.