



NATIONAL EMPLOYERS RETIREMENT TRUST

IRA Rollover Request

Use this form to transfer your conduit or rollover IRA from your current custodian to a rollover IRA account in the National Employers Retirement Trust. If you already have an IRA account with NERT, complete this page and forward it to NERT at the address below. **If you do not currently have an IRA account with NERT, you will also need to complete the adoption agreement on the following pages.**

Ø Please provide the following information:

Your Name		Daytime Phone	
Your Address		Social Security Number	
City, State, Zip		Current Employer	

U Tell us about your retirement account: Please provide us with a copy of your most recent IRA account statement.

Financial Institution			
Address			
City/State/Zip		Account Number	
Contact Name/Department		Contact phone number	

U How do you want to invest your IRA rollover funds?

Provident Mutual Guaranteed Fund		Fidelity Blue Chip Fund	
Strong Government Securities Fund		American Century Ultra Fund	
Strong Corporate Bond Fund		Artisan International Fund	
Vanguard Wellington Fund		Parnassus Socially Conscious Fund	
MFS Value Fund			
Vanguard S&P 500 Index Fund		Total Allocations (must equal 100%)	

U Please authorize your current trustee/custodian to directly transfer your IRA rollover account to your IRA account in NERT.

To Transferor Trustee, Custodian or Employer:

Please accept this as your authority to directly roll over " all or " part (\$ _____) of my rollover/conduit IRA account to my IRA account in the National Employers Retirement Trust. Although SunTrust Bank, custodian of the National Employers Retirement Trust, is a bank, I recognize that neither the National Employers Retirement Trust nor any Plan or Investment Company shares in which this plan is invested is a bank and that Plan shares are NOT (i) deposits or obligations of, or guaranteed by, any depository institution, or (ii) insured by the FDIC, the Federal Reserve Board or any other agency, and ARE subject to investment risk, including possible loss of principal.

I have received and read the prospectus for the Plan in which I am making my investment. If I am over age 70 1/2, I attest that none of the amount to be rolled over will include the required minimum distribution for the current year pursuant to Section 401(a)(9) of the Internal Revenue Code. I certify that the distribution(s) from my IRA account that is hereby being rolled over to my NERT account qualified for rollover treatment and I irrevocably elect to treat such contribution(s) as a rollover contribution(s).

Participant Signature _____

Date _____

U Acknowledgment

The National Employers Retirement Trust acknowledges that it has established an account for the individual listed above. Please issue your check payable to **NERT, FBO Participant's Name**. We will accept any and all funds that discharge the obligation listed above and requests that such funds be sent to the following address:

Administrator, National Employers Retirement Trust
4701 Sangamore Rd., Suite 205 South
Bethesda, MD 20816
(301) 320-9300; (301) 320-6854 (fax)

Plan Administrator, NERT