

1. All Taxable – Only the Taxable amount will be sent to the rollover company. If you have any non-taxable income, it will be paid directly to you and you must complete the direct deposit section.
2. All of Gross Amount – Both taxable and non-taxable funds will be sent to your rollover company – A letter of acceptance is required from your designated financial institution indicating both taxable & non-taxable income will be accepted.
3. \$ of Taxable amount – Enter the dollar amount you wish to roll over. If you have any remaining taxable income & non-taxable income, you must complete the direct deposit section.
4. % of Taxable Income – Enter the % you wish to roll over. – If you have any remaining taxable income and non-taxable income, you must complete direct deposit section.