

## Hudson Acquisition/BenefitGuard Retirement Savings Plan

### *How to Rollover your Funds from another Retirement Plan or IRA*

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The Plan accepts rollovers from qualified plans (401(k), profit sharing, money purchase, etc.), 403(b) plans, 457 (b) plans, or IRAs.

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#### STEP 1: REQUEST ROLLOVER FROM PRIOR PLAN OR IRA

- Contact your former retirement plan provider or IRA custodian to request a direct rollover of your funds from your prior plan or IRA.
- Request that the rollover check be made payable to ***"TDATC fbo Plan Account # TBOBENGUARD/[enter your name here]"***, and include ***"Hudson Acquisition/BenefitGuard Retirement Savings Plan"*** in the check's memo field or otherwise prominently indicated on the check. Direct that the check to be sent directly to you. ***Checks made payable to any other person or entity will be rejected and returned.***
- Request that you be provided a "distribution statement" verifying that the funds being rolled over from a qualified plan or IRA. This information is often included on the rollover check stub.

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#### STEP 2: SUBMIT ROLLOVER PACKAGE

- Complete the attached Rollover Contribution Form.
- Attach your rollover check and distribution statement to the Rollover Contribution Form, and send the entire package to: BlueStar Retirement Services, Inc., Attn: Rollover Processing Department, 822 A1A N, Suite 211, Ponte Vedra Beach, FL 32082.

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#### STEP 3: ROLLOVER PROCESSING

- Upon receipt and approval of your rollover package, your rollover will be deposited into your account with Hudson Acquisition/BenefitGuard Retirement Savings Plan and invested in accordance with your standing investment elections; if you have not yet made affirmative investment elections, your rollover will be invested in the Plan's default investment alternative.
- You can check for the deposit by accessing your account online at [www.myplanconnection.com](http://www.myplanconnection.com).
- If your rollover request is rejected for any reason, you will be notified. Call 800.878.5220 with any questions.