

Please read and follow all instructions carefully. Incomplete paperwork may cause delays or prevent your request from being processed.

Critical information to consider:

- The Force Out Distribution Election Form contained in this document is generic. Paperwork is not specific to your plan.
- The Force Out Distribution Election Form should be used only if the terminated participant's vested account balance is less than \$1,000; and the participant does not return distribution paperwork after 30 days.
- A plan trustee must complete all blank spaces on the Force Out Distribution Election Form and ensure the required steps are satisfied prior to submitting paperwork via fax (816-218-0079).
- The plan trustee must instruct Prime Plan Solutions to distribute the vested balance (and withhold the mandatory 20% for federal income tax) **after** all employer contributions to which the participant is entitled are deposited to the plan.
- Prime Plan Solutions will process a cash distribution as soon as administratively feasible upon receiving paperwork in good order.
- All distribution checks are delivered to the plan trustee. The trustee should retain a copy for the plan's records before distributing to the participant. Should you require a check to be delivered to another institution or directly to the participant, the trustee's signature must be medallion signature guaranteed by a bank or brokerage firm*. A notary public stamp is not acceptable.
- Please contact your Third Party Administrator with questions regarding distributions. If you need help completing the form, then contact Prime Plan Solutions at 888-445-0031, Monday through Friday from 8:30 AM to 6:00 PM Eastern Time or send an e-mail to primeplansolutions@dstsystems.com.

*Paperwork containing a medallion signature guarantee cannot be faxed; the original form is required.

Force Out Distribution Election Form

This form should be used to liquidate participant assets when all of the following conditions apply:

- Participant terminated services and is no longer an employee of the company;
- All employer contributions owed to the participant have been deposited;
- Participant Distribution Election Form and a copy of the Special Tax Notice were provided to the participant upon termination;
- Participant failed to respond to termination paperwork within 30 days of receipt;
- **Participant's vested account balance is less than \$1,000.**

Plan Name: _____ Plan Number: _____

Participant: _____ Date Employment Terminated (**Required**): _____

Last 4 digits of SSN#: _____ Date of Birth: _____ Vested Percent (**Required**): _____

Please process an automatic distribution for the above named participant. I certify the participant was properly notified of his/her distribution rights under the plan and has failed to provide written instructions to distribute the vested balance. Further, I certify the participant's vested balance including rollovers is under \$1,000 and that all employer contributions to which the participant is entitled have been deposited to the plan.

I understand that Prime Plan Solutions will withhold 20% for federal income tax and remit it to the IRS. Please mail the distribution check to the plan's address and I will distribute it to the participant.

Trustee Signature

Print Name

Date

Indicate below if you prefer to have the check sent directly to the participant's address.

_____ *Please send the distribution check directly to the participant's address. I am aware that I will not receive a copy of the check for my records. (**This option requires the trustee's signature to have a medallion guarantee. If not provided, the distribution check will be mailed to the plan trustee.**)

*Participant's Address: _____ (Street)

_____ (City, State, Zip)

If you want the check sent directly to the participant's address, we require a medallion signature guarantee from the trustee on the distribution form. Eligible guarantors include:

Commercial banks

Trust companies

Savings and loans

Credit unions

Savings banks

Member firms of a national stock exchange

Please note: a notary public is not an acceptable provider of medallion signature guarantees. The guarantee stamp must be an original; copies are not acceptable and cannot be faxed to Prime Plan Solutions.

If distribution check is to be delivered to the plan trustee, then fax the completed form to Prime Plan Solutions at 816-218-0079.