



Completing a Distribution Request:

Generally you may request a Distribution/Withdrawal from your voluntary retirement plan if:

- You are retired or separated from service from the employer that made salary reduction contributions to your 403(b) retirement account.
- You become permanently disabled (as defined by IRS regulations)
- You have attained the age of 59½

Your retirement plan may have additional restrictions on distributions. Please consult your financial representative, your employer's benefits department, or your Plan Administrator, NPA, to determine if you are eligible to make a full or partial withdrawal from your voluntary retirement plan.

Please be sure to read the special tax notice regarding tax withholding and potential tax penalties of making a withdrawal from your voluntary retirement plan. This information should be provided to you by your current investment provider.

NPA requires all forms necessary to complete a transactional request be submitted through NPA. Therefore, you should contact your financial representative or investment provider to get a copy of the paperwork they require to complete a Distribution/Withdrawal.

Next, you will complete the NPA Transaction Authorization Form indicating your desire to process a Distribution/Withdrawal from your plan. Fill out section one (1) of the TAF, providing general information about who you are, what school district(s) are involved, and what investment provider(s) are involved. Section two (2) of the TAF consists of nine (9) subsections. When requesting a Distribution/Withdrawal, please fill out **ONLY** the subsection for "Distribution/Withdrawal" located on page two (2) of the TAF. Complete the form by signing and dating the request on the third page. Please note that it is important to carefully read the entire TAF as it will assist you in completing it correctly.

For NPA to correctly and successfully process your request please submit the completed Transaction Authorization Form and the completed investment provider Distribution/Withdrawal paperwork to NPA via any of the means listed at the base of the TAF. Your financial representative can assist you in filling out and completing all forms.

Once your request has been reviewed and approved it will be forwarded to the applicable investment provider for processing.