



RSA-1 Investment Option Election for Incoming 457 Transfer

Retirement Systems of Alabama
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Your SSN _____

Your Information

Name _____
First Middle/Maiden Last

Mailing Address _____
Street or P.O. Box Apt.# City State ZIP Code

Telephone Number _____ Email Address _____

Date of Birth _____ PID (optional) _____

Investment Option Election

I elect the following investment option for **trustee-to-trustee transfer funds**. You can elect to have 100% in the fixed income, equity, or short-term investment option election or split the percentages between the investment options, but they must add up to 100%.

Invest _____ % of **trustee-to-trustee transfer funds** in the RSA-1 **FIXED INCOME** investment option.

Invest _____ % of **trustee-to-trustee transfer funds** in the RSA-1 **EQUITY** investment option.

Invest _____ % of **trustee-to-trustee transfer funds** in the RSA-1 **SHORT-TERM** investment option.

RSA-1 **FIXED INCOME** investment option: The fixed income portfolio is invested in various debt instruments with maturities greater than one year, such as corporate bonds, U.S. agency obligations, mortgage obligations, and commercial paper.

RSA-1 **EQUITY** investment option: The equity portfolio is invested in a S&P 500 Index Fund.

RSA-1 **SHORT-TERM** investment option: The short-term investment fund (STIF) could include high-quality money market securities, U.S. Treasury bills or notes, and U.S. Government agency notes with a maturity of one year or less.

Please note that Fixed Income, Equity, and Short-Term Investment Options are all subject to market fluctuations.

Signature Certification

I understand the following regarding this investment option election:

My election must be made prior to the funds being transferred.

My election can be made **once every 90 days**.

My election will remain in effect until a subsequent election is made, but it must remain in effect for **90 days**.

Sign Here → Your Signature _____ Date _____