RSA-1 EN IOE
457 Transfer
03/15

INVESTMENT OPTION ELECTION FOR INCOMING 457 TRANSFER
RSA-1 DEFERRED COMPENSATION PLAN

Retirement Systems of Alabama
P. O. Box 302150 ♦ Montgomery, AL 36130-2150
334-517-7000 or 877-517-0020
www.rsa-al.gov

Name _____
First Middle/Maiden Last

Address _____
Street or P. O. Box

_____
City State Zip Code

Social Security Number or PID _____ **Date of Birth** _____
Month Day Year

Email Address _____ **Phone Number** _____

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**.

457 TRANSFER ACCOUNTS ONLY

I elect the following investment option for **trustee-to-trustee transfer funds**. You can elect to have 100% in the bond, stock, 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 **BOND** investment option. The bond 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.

Invest _____ **%** of **trustee-to-trustee transfer** funds in the RSA-1 **STOCK** investment option. The stock portfolio is invested in an S&P 500 Index Fund.

Invest _____ **%** of **trustee-to-trustee transfer** funds in the 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.

AUTHORIZATION

Signature of Employee _____ **Date** _____