



RSA-1 Fund Allocation for Incoming Transfer or Rollover

Retirement Systems of Alabama
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Your SSN

Your Information

Name _____
First Middle/Maiden Last

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

Telephone Number _____ Email Address _____

Date of Birth _____ PID (optional) _____

Investment Options

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 an 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.

Fund Allocation

I elect the following investment option account type:

Check one: DROP Governmental 457(b) Transfer PLOP ERIP TSP

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 your selected investment option(s) must add up to 100%.

Invest _____ % of **Pre-Tax funds** in the RSA-1 **FIXED INCOME** investment option.

Invest _____ % of **Pre-Tax funds** in the RSA-1 **EQUITY** investment option.

Invest _____ % of **Pre-Tax funds** in the RSA-1 **SHORT-TERM** investment option.

I elect the following investment option for **457(b) Designated Roth**:

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 your selected investment option(s) must add up to 100%.

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

Invest _____ % of **Roth funds** in the RSA-1 **EQUITY** investment option.

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

Signature Certification

I understand the following regarding this investment option election:

- My election must be made prior to the funds being transferred.
- My election will be used for my Incoming Transfer/Rollover.

Sign Here → Your Signature _____ Date _____