



# RSA-1 Fund Reallocation for Existing Accounts

Retirement Systems of Alabama  
PO Box 302150, Montgomery, Alabama 36130-2150  
877.517.0020 • 334.517.7000 • www.rsa-al.gov



## Your SSN

\_\_\_\_\_

**Check one:**  Member Account  Beneficiary Account **Check one:**  RSA-1  PEIRAF

### 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/PEIRAF **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/PEIRAF **EQUITY** investment option: The equity portfolio is invested in an S&P 500 Index Fund.

RSA-1/PEIRAF **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.**

### Deceased Participant or Beneficiary Information

*Only include Name and SSN if this is a beneficiary account.*

Name \_\_\_\_\_ SSN \_\_\_\_\_  
The information above pertains to the deceased participant or beneficiary.

My fund reallocation will become effective within the first three business days of the month, following the actual receipt of this form. This form must be received by RSA-1 no later than midnight of the third business day prior to month end to be effective for next month. Online submissions are accepted up to midnight of the last calendar day of the month. If you need assistance with creating a Member Online Services (MOS) account, please contact our office. I elect the following for my account.

### Available Account Types

|                               |  |                          |                       |
|-------------------------------|--|--------------------------|-----------------------|
| Regular Contributions Pre-Tax | 457(b) Transfer Pre-Tax  | DROP Rollover Pre-Tax    | PLOP Rollover Pre-Tax |
| Regular Contributions Roth    | TSP Rollover Pre-Tax   | Transfer/Conversion Roth | ERIP Rollover Pre-Tax |
| Regular Contributions PEIRAF  | <i>Indicate the percentage you would like in each account:</i> |                          |                       |

### Account Type Selection

Choose from one of the Available Account Types listed above.

| List Account Type(s) | Type of Funds | Percentages Only (must equal 100%) |
|----------------------|---------------|------------------------------------|
|                      | Fixed Income  |                                    |
|                      | Equity        |                                    |
|                      | STIF          |                                    |
|                      | Fixed Income  |                                    |
|                      | Equity        |                                    |
|                      | STIF          |                                    |
|                      | Fixed Income  |                                    |
|                      | Equity        |                                    |
|                      | STIF          |                                    |

### Signature Certification

*Signature of participant or beneficiary.*

**I understand the following regarding this investment option election:**

- My election can be made **once a month**.
- I may stop contributing at any time.

**For those who have more than three account types:**

- This election only pertains to the account types you have selected above.
- If you would like to make changes to additional account types, please include those on another form.

**Sign Here →** Your Signature \_\_\_\_\_ Date \_\_\_\_\_