

# IN-SERVICE DISTRIBUTION REQUEST FORM

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Please Complete ALL Fields.

Plan Name: \_\_\_\_\_

Participant Name \_\_\_\_\_  
First MI Last

\_\_\_\_\_  
Mailing Address of Participant

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
e-mail Address

\_\_\_\_\_  
Marital Status

\_\_\_\_\_  
Date of Birth

Mailing:  E-mail  
 Hardcopy Postal

In-Service Amount: \$ \_\_\_\_\_

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(This Section is for Employer Representative to Complete)

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Date of Hire

Hours Worked in Current Plan Year:  Less Than 1000 Hours  
 Greater Than 1000 Hours

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date of Next Payroll

Approved By: \_\_\_\_\_  
Authorized Plan Representative's Name Authorized Plan Representative's Signature Date

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(This section is for TPA administrative purposes)

\_\_\_\_\_  
Participant Vesting %

\_\_\_\_\_  
Age

\_\_\_\_\_  
Loan