

University of Hawai'i

403(b) Exchange Authorization Form



UNIVERSITY
of HAWAII®
SYSTEM

Participant Instructions	<p>The University of Hawai'i 403(b) Exchange Authorization Form must be submitted to National Benefit Services, LLC (NBS), the third party administrator, to authorize any exchange of 403(b) amounts between exchange eligible investment providers of your employer or former employer's 403(b) plan. The exchanging investment provider will require its own paperwork in addition to this form. You may wish to attach your investment provider's paperwork to this form. All attached forms or paperwork will be forwarded to the exchanging investment provider indicated below. Complete steps 1-4 and mail or fax this form to NBS. Inquiries regarding the status of your exchange may be directed to NBS at (800) 274-0503 ext 5. After paperwork has been forwarded to your investment provider, inquiries should be directed to your provider. After this form has been received by NBS in good order, it will be forwarded to your provider within 5 business days. Submission of this form does not affect any existing salary reduction arrangements you currently maintain with your employer. If you wish to discontinue or direct future contributions to a new vendor you must complete a corresponding new salary reduction agreement (SRA). A list of exchange-eligible investment providers and SRA form are available at www.nbsbenefits.com/uh403b.</p> <table style="width:100%; border:none;"> <tr> <td style="width:30%;">NBS Mailing Address:</td> <td style="width:30%;">National Benefit Services, LLC 8523 South Redwood Road West Jordan, UT 84088</td> <td style="width:20%;">NBS Fax Numt</td> <td style="width:20%;">800-597-8206</td> </tr> <tr> <td></td> <td></td> <td>NBS Email - for questions only:</td> <td>403bservice@nbsbenefits.com</td> </tr> <tr> <td></td> <td></td> <td>NBS Phone Number:</td> <td>800-274-0503 ext. 5</td> </tr> </table>			NBS Mailing Address:	National Benefit Services, LLC 8523 South Redwood Road West Jordan, UT 84088	NBS Fax Numt	800-597-8206			NBS Email - for questions only:	403bservice@nbsbenefits.com			NBS Phone Number:	800-274-0503 ext. 5																																															
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Investment Provider Instructions	<p>NBS represents this exchange of 403(b) amounts is permitted by the employer's plan and is in accordance with a 403(b) Provider/Information Sharing Agreement (Agreement) entered into by the receiving provider (if applicable) and NBS, provided that NBS has signed below. The exchanging investment should provide to the receiving provider at the time of the exchange information regarding the portion of the exchanged amount represented by deferral amounts and, in the case of Roth amounts (if allowed by the plan), the Roth portion and commencement date of the 5-year holding period. NBS reserves the right to not sign surrendering or receiving vendor paperwork according to the ISA (if applicable).</p>																																																													
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