



RETIREMENT BOARD
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COUNTY TREASURER

Commonwealth of Massachusetts

BRISTOL COUNTY RETIREMENT SYSTEM

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RETIREMENT BOARD MEMBERS

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ROXANNE L. DONOVAN

ROLLOVER REQUESTS

BRISTOL COUNTY RETIREMENT REQUIRES THE FOLLOWING DOCUMENTATION TO PROCESS ALL ROLLOVER REQUESTS. PLEASE NOTE YOUR REQUEST **WILL NOT** BE PROCESSED UNTIL WE RECEIVE THIS DOCUMENTATION.

BRISTOL COUNTY RETIREMENT REQUIRES A ROLLOVER AUTHORIZATION OR ACCEPTANCE LETTER FROM YOUR QUALIFIED PLAN PROVIDER. THIS DOCUMENT MUST INCLUDE THE FOLLOWING INFORMATION:

1. PLAN PROVIDER MUST STATE THEY WILL ACCEPT A DIRECT ROLLOVER FROM BRISTOL COUNTY RETIREMENT
2. PLAN PROVIDER MUST STATE WHO THE CHECK SHOULD BE MADE PAYABLE TO
3. PLAN PROVIDER MUST PROVIDE THE ADDRESS WHERE THE CHECK SHOULD BE MAILED
4. PLAN PROVIDER MUST SIGN THE ROLLOVER AUTHORIZATION OR ACCEPTANCE LETTER

AGAIN, WE ARE UNABLE TO PROCESS YOUR REQUEST UNTIL THIS DOCUMENTATION IS RECEIVED.