

After-Tax Balance

Please be advised that your after-tax balance is eligible to be rolled over to an IRA or to another qualified plan (excluding 403(b) and 457 plans), subject to the receiving plan's provisions. You may also elect to have the after-tax balance mailed directly to you.

Payment Instructions

Cash - By selecting this option you will receive the partial distribution less taxes.

Vanguard IRA - By selecting this option you may choose to have all of the partial distribution rolled over to a Vanguard IRA. Call a Vanguard Specialist at 800-523-1188. Your specialist will assist you in preparing the necessary IRA Adoption Agreement.

Other Eligible Retirement Plan: IRA or Qualified Plan - By selecting this option you may have the partial distribution rolled over to an IRA or qualified plan. Your Benefits Office will supply you with a Direct Rollover Form. In addition, it is your responsibility to open an account at the receiving institution prior to initiating your direct rollover through Vanguard.