





Annuity Contract Number \_\_\_\_\_

**3** TRANSFER REQUEST

Date Select one. If none selected, the assets will be transferred or rolled over immediately.

Immediately

At Maturity Date:

mo / day / yr

By specifying the date, I/We2.006 (er Q 57.4nJ (a)18.e)19.02siedte,lh98 ()18.998 (2)18.9t02 (e)18.998 ()18.9Pq.o9.02s2cif998 (i)17.c04 (y)17.994 (fL



Annuity Contract Number \_\_\_\_\_

**3** TRANSFER REQUEST (continued)

C) Qualified and 457(b) Governmental Assets: Authorization for Transfer/Direct Rollover

As owner of the plan indicated below, I direct the institution named in Section 2 to convert to cash the assets in the account and transfer money to Pacific Life. I understand that the transfer/rollover will be initiated when all requirements are received in good order. If I am setting up a new Pacific Life annuity contract with this transfer/direct rollover, I have completed and attached a new contract application. If I am rolling over assets from one type of employer-sponsored plan or IRA to a different type of employer-sponsored plan or IRA, I certify that all of the assets being rolled over are pre-tax assets. I am aware that once the assets are rolled over into my existing Pacific Life contract, they will be subject to the federal tax rules applicable to the assets currently in that contract. If any assets are being rolled over from a 457(b) plan, I certify that the 457(b) plan is that of a government entity and that the plan document allows for this rollover.

I understand that Pacific Life is NOT currently permitting transfers from other qualified retirement plans, 403(b)s, and IRAs into 457(b)s. I have discussed the tax consequences of rollovers with my tax advisor.

Please note, if you have reached RMD age and have a qualified contract, please consider whether you should take your Required Minimum Distribution prior to completing the transfer from the financial institution relinquishing these assets. If you have an existing Pacific Life calculated Required Minimum Distribution scheduled withdrawal program, additional transfers into Pacific Life will not be included in the current year's program, therefore, an additional withdrawal(s) may be required to satisfy the minimum distribution amount.

Type of Plan Surrendered Select One:

- |               |         |                     |            |        |
|---------------|---------|---------------------|------------|--------|
| IRA           | SEP-IRA | SIMPLE IRA          | Roth IRA   | 401(a) |
| Inherited IRA | 401(k)  | 457(b) Governmental | TSA/403(b) |        |

**4** RETURN OF LIFE INSURANCE POLICY OR ANNUITY CONTRACT Does not apply to partial 1035 exchanges of annuity contracts.

Unless the surrendering company's policy or contract is attached, I affirm that the policy or contract has been destroyed or lost and that reasonable effort has been made to locate it. To the best of my knowledge, no one else has any right, title, or interest in the contract, nor has it been assigned, pledged, or encumbered.

**5** FOR TSA /403(B) CONTRACTS ONLY

INFORMATION AND AUTHORIZATION This section must be completed and signed by the employer or authorized third-party administrator.

Employer Information (Required)	Third-Party Administrator (Required unless self-administered)
Employer's Name	Third-Party Administrator's Name
Street Address	Street Address
City, State, Zip	City, State, Zip





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When to use this form:

Use this form to request transfer/exchanges from another financial institution to an annuity contract at Pacific Life. Complete one form for each transfer/exchange.

To complete this form:

Print clearly in dark ink. Provide requested information in full. An incomplete form may delay processing. Do not highlight any information submitted on this form. Paperwork submitted to Pacific Life is scanned into an imaging system and highlighting could make that information unreadable.