

# Traditional IRA Rollover Certification Form

GuideStone Funds  
P.O. Box 9834  
Providence, RI 02940-8034

GuideStone Trust Services, an affiliate of GuideStone Financial Resources  
of the Southern Baptist Convention, serves as IRA custodian.  
For assistance, please call **1-888-98-GUIDE (1-888-984-8433)**.

**Use this form to certify a rollover distribution made payable to you from your current Traditional IRA, or an eligible distribution which you have physically received from an employer-sponsored retirement plan to your GuideStone Funds IRA.** You must complete the rollover within 60 calendar days of your receipt of that distribution.

**Please note:** 20% withholding is required on any eligible rollover distribution from an employer-sponsored retirement plan unless the distribution is transferred directly to an IRA or other employer-sponsored retirement plan. To transfer your distribution directly, please complete the *Traditional IRA Transfer of Assets/Direct Rollover* form included with this application. A rollover contribution to your IRA is not tax deductible.

**Special required minimum distribution notice:** If you will attain age 70½ during the calendar year or are older, and are required to take a minimum distribution from your employer-sponsored retirement plan or IRA, you must either take that distribution prior to rolling over your plan or IRA assets to GuideStone Funds or you may leave that distribution amount in the employer-sponsored retirement plan or IRA and withdraw it prior to the distribution deadline (generally December 31).

## 1. PARTICIPANT INFORMATION (THE FORM MUST BE COMPLETED IN INK)

Participant first name: \_\_\_\_\_ MI: \_\_\_\_\_ Last: \_\_\_\_\_

Social Security number: \_\_\_\_\_ Birth date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Home telephone: (\_\_\_\_) \_\_\_\_\_ Daytime telephone: (\_\_\_\_) \_\_\_\_\_

Mailing address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

Physical address (if different from above): \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

E-mail address (optional): \_\_\_\_\_

## 2. TYPE OF ROLLOVER/CONVERSION CONTRIBUTION (PLEASE CHECK ONE)

- IRA rollover — Note that 365 days must have passed since you last received a rollover distribution from the distributing IRA.
- Eligible rollover distribution — A non-periodic distribution from an employer-sponsored retirement plan of all or part of your account balance, other than the portion of any distribution which is nontaxable, which is being rolled over into your GuideStone Funds IRA within 60 days of receipt. Your employer's Benefits Department or Human Resources should be able to tell you what portion of your distribution is an eligible rollover distribution.
- Qualified Domestic Relations Order Distribution.

## 3. CERTIFICATION

I certify that the contribution described above is an eligible IRA rollover contribution and that I am rolling over this contribution within 60 calendar days of my receipt of that distribution. I understand that this rollover is irrevocable and involves important tax considerations. Specifically, I understand that a rollover contribution from an employer-sponsored retirement plan will no longer be eligible for any special averaging, capital gains and separate tax treatment that may be available for distributions from such plans. Other tax considerations may also apply.

I agree that I am solely responsible for all tax consequences of this rollover contribution. I also agree neither GuideStone Trust Services, nor GuideStone Funds or its affiliates shall have any responsibility for any such tax consequences.

I understand that if I will attain age 70½ during the calendar year or am older and am required to take a minimum distribution from my retirement plan, I must either take that distribution prior to rolling over my retirement plan assets to GuideStone Funds or I may leave that distribution amount in the existing plan and withdraw it prior to the distribution deadline (generally December 31).

I have read and understand and agree to be legally bound by the terms of this form. I also understand that the IRA custodian will rely on this form when accepting my rollover contribution. I understand that this rollover is irrevocable and may not be reversed in the future. I also understand that I am responsible for the movement of the rollover to my successor IRA, and that neither GuideStone Trust Services, nor GuideStone Funds or its affiliates have any duty to enforce the collection of any assets to be rolled over to my GuideStone Funds IRA.

Participant signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

