



MidAmerica

Administrative & Retirement Solutions, Inc.
211 East Main Street, Suite 100, Lakeland, FL 33801
866.873.4240 / (FAX) 863.688.4466
www.midamerica.biz

403(b) Retirement Savings Plan

DATE STAMP

Questions? Call our Service Center at 1-866-873-4240

TRANSACTION ROUTING FORM

To facilitate your request, this form must accompany any contract exchange, rollover, distribution, or loan request paperwork provided by your 403(b) investment provider.

I am returning additional information for a previously submitted request.

Employee Data - ALL FIELDS REQUIRED

Employer Name:
Name: Social Security #: Date of Birth:
Address:
Daytime Phone #: Evening Phone #: Email:
Agent Name: Agent Phone Number:

Transaction Information - Please select transaction type

403(b) Contract Exchange
Loan Request
Distribution Request

Please forward all paperwork regarding this transaction to:

According to instructions on investment provider forms
Special Instructions - Attn: Address: Fax:

Signature of Employee Date (mm/dd/yyyy)

Submit completed form along with all investment provider paperwork pertaining to this request to:
MidAmerica Administrative & Retirement Solutions, Inc.
DEPT: 403bTPA
211 East Main Street, Suite 100, Lakeland, FL 33801
Fax: 863-688-4466