



New York State Teachers' Retirement System

10 Corporate Woods Drive
Albany, New York 12211-2395

(800) 348-7298 or (518) 447-2900

Website: NYSTRS.org

RE:

Name: _____

NYSTRS ID: _____

To Whom It May Concern:

The New York State Teachers' Retirement System is a defined benefit governmental plan within the meaning of 414(d) of the Internal Revenue Code. As long as any monies being rolled over are coming from an acceptable plan, our System must accept these monies.

The purpose of the direct transfer transaction for the above referenced member is the purchase of permissive service credit, within the meaning of Internal Revenue Code Section 415(N)(3)(A). The transfer includes restricted funds, and the transfer of these funds to our plan will not permit avoidance of any otherwise applicable restriction.

Enclosed is a copy of our most recent fact sheet (FAC-805), which contains important instructions that must be followed in order to allow us to accept payment in this manner pursuant to the statute.

Please note that the documentation forwarded with the monies must contain the actual words:

- **eligible 403(b);**
- **eligible governmental 457 plan;**
- **traditional IRA; or,**
- **401(a) qualified plan/401(k).**

Without this wording, acceptance of the monies will be delayed.

If you have questions, please contact (800) 348-7298, Ext. 6250.

Sincerely,

Member Services Department

Enclosure