



Transaction Request Form
Morehouse Parish School Board 403(b) Plan

After completing the form, send via mail, fax or e-mail to:
Amy L. Griffith, OKA
2020 E 70th Street
Shreveport, LA 71135
agriffith@wernitz.com
Fax: (318) 798-3206

Name: _____
Date of Birth: _____

Purpose of Form:

- Transfer 100% of Contract: From _____ (supply Contract #) to _____
- Change of Contribution Amount: From _____ to _____
- Withdrawal Request : check one _____ Hardship or _____ In Service (must be 59 1/2)
- Loan Request: Amount \$ _____ and length of loan (months up to 60) _____
- Surrender of Contract (no longer employed with MPSB) Contract # & Provider _____

I give Morehouse Parish School Board and/or Wernitz & Associates, Inc. my permission to access my account via telephone or internet as required in order to process the above requested transactions. In some cases I understand that this may require W&A to set up my online account if I have not already done so. My user id and password will be mailed to me at the address below. I may then access my account at any time and change the setup information.

Participant Signature _____ Date _____

Current Address: _____
E-mail address: _____
Phone Number: _____

Approved to proceed with processing
Note: _____

Not Approved for reason below:
Further action required: _____

Other: _____

Amy L. Griffith, OKA (TPA Signature) _____
Vice President, Wernitz & Associates, Inc. _____
Date _____

Morehouse Parish School Board Approval _____
Date _____