

RETIREMENT PLAN AND TRUST FOR FIREFIGHTERS OF THE CITY OF LAKE MARY TRANSFER INSTRUCTIONS

Members transferring funds to the Retirement Plan and Trust for Firefighters of the City of Lake Mary should complete the following steps:

You should obtain an account distribution form from the plan or financial institution that currently holds the funds. You will always need the correct paperwork from the financial institution that has the money.

- You will indicate a transfer of funds to the Lake Mary Firefighters Retirement System.
- You will provide the following instructions for delivery of the funds:

Make Checks Payable to: **Lake Mary Firefighters Retirement System**
FBO: [Member Name]
c/o Resource Centers, Plan Administrator
4360 Northlake Blvd. Suite 206
Palm Beach Gardens, FL 33410

You should return the completed account distribution form to the financial institution that currently holds your funds and keep a copy for your own records.

Please direct any questions to the Client Service Team at the Resource Centers:

☎ (561) 624-3277

✉ lakemarypolice&fire@resourcecenters.com