

**Putnam Defined Contribution Plans**  
P.O. Box 9740  
Providence, Rhode Island 02940-9740

# **PUTNAM INVESTMENTS**

Dear Plan Participant:

The enclosed materials are to assist you with your request concerning a rollover into the Electrical Workers Local Union No. 369 Retirement Plan.

The Electrical Workers Local Union No. 369 Retirement Plan is a tax qualified retirement plan that accepts direct rollover of eligible rollover distributions from other qualified retirement plans and/or IRA's. Contact your previous Plan Administrator to determine if your distribution is eligible for rollover. Please instruct your previous Plan Administrator to make the check payable as follows:

**Putnam Fiduciary Trust Company as Custodian of the  
Electrical Workers Local Union No. 369 Retirement Plan  
For the benefit of (name)**

Please fill out the applicable sections of the enclosed Rollover Contribution Form, making sure investment elections total 100%. If you do not select investment elections that total 100%, your rollover will not be invested until complete information is received from you.

All information must be returned to **Putnam** for approval. Please return the Rollover Contribution Form, along with any necessary documentation to:

**Putnam Investments  
Defined Contribution Plan Administration  
Electrical Workers Local 369 Retirement Plan  
PO Box 9740  
Providence, RI 02940-9740**

If you have any questions or require further assistance, please call a Putnam Member Services Representative at our toll-free number 1-877-864-6644.

Sincerely,

Putnam Investments  
Defined Contribution Plan Administration

Enclosure(s)

CV(11)651126-052 10/19/04





# PUTNAM INVESTMENTS

1-877-864-6644

## The Electrical Workers Local Union No. 369 Retirement Plan ROLLOVER CONTRIBUTION FORM



- Use this form to make a rollover contribution into the plan from your prior employer's qualified plan or from a conduit IRA. A "conduit IRA" is a traditional IRA that contains only amounts rolled over from a former employer's qualified plan, plus earnings on those amounts.
- If you have not already done so, you must also complete a Beneficiary Designation Form.
- Your choices on this form may affect your taxes. You may want to consult a tax or financial advisor.
- Please return completed form to: Putnam Investments, DCPA, Attn: Electrical Workers Local 369 Retirement Plan, P.O. Box 9740, Providence, RI 02940-9740.

### Participant Information Please print clearly in CAPITAL LETTERS.

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Last Name

\_\_\_\_\_  
First Name

\_\_\_\_\_  
MI

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
Apt. #

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip Code

\_\_\_\_\_  
Daytime Telephone Number

\_\_\_\_\_  
Evening Telephone Number

\_\_\_\_\_  
E-mail Address

### Rollover Contribution Election

You may request to rollover into the plan any pre-tax amounts distributed from a conduit IRA or any pre-tax amount that is an "eligible rollover distribution," as described in the tax notice regarding plan payments that should have been provided to you when you received a distribution from your prior employer's plan. A "conduit IRA" is a traditional IRA that contains only amounts rolled over from a former employer's qualified plan, plus earnings on those amounts. Certain distributions – for example, installment payments that are part of a series running for 10 years or more, "hardship" distributions, "required minimum distributions" after you reach age 70 1/2, or after-tax and nondeductible contributions – are not eligible for rollover. This Plan does not accept rollover distributions of member after-tax contributions.

I request that the plan accept the following rollover contribution (*check one*):

- A "direct rollover" from my former employer's qualified plan or my conduit IRA (*check one*):
- I have attached a check from my former employer's qualified plan or my conduit IRA, payable to "Putnam Fiduciary Trust Company, f/b/o [my name]", in the amount of \$ \_\_\_\_\_.
- My former employer's qualified plan or my conduit IRA will transfer approximately \$ \_\_\_\_\_ directly.



0100ROLC651126

OVER  
CV(11)651126-009 10/19/04

### 3 Investment Election

I elect to invest my rollover contribution in whole percentages, as follows (complete):

Name of Investment Fund:	Percentage
ST IBEW/NECA Stable Value Fund	%
RF PIMCO Total Return Fund	%
TR Dodge & Cox Balanced Fund	%
50 Putnam S&P 500 Index Fund	%
GP Fidelity Dividend Growth Fund	%
YN Putnam Equity Income Fund	%
AM American Funds Growth Fund of America	%
RA Royce Low Priced Stock Fund	%
P3 Julius Baer International Equity Fund	%
PA Putnam Retirement Manager Union Growth Fund	%
P8 Putnam Retirement Manager Union Balance Fund	%
P5 Putnam Retirement Manager Union Conservative Fund	%
<b>Total must equal:</b>	<b>100 %</b>

Investors should consider the investment objectives, risks, charges and expenses of a fund carefully before investing. For a prospectus or an offering statement containing this and other information about any fund, please call your plan's toll-free number. Read the prospectus or offering statement carefully before making any investment decisions.

If you do not provide any investment election above or if the percentages you provide above do not total 100%, your rollover contribution will not be invested until complete information is received from you.

### 4 Participant Signature

I understand that my rollover contribution is subject to approval by the Plan Administrator. I have attached at least one of the following required documents:

- Distribution Statement from previous employer's plan
- 1099-R Form

If rolling over a conduit IRA, you must also provide your distribution statement or latest statement of participation from the institution that maintained your IRA.

\_\_\_\_\_  
Signature of Participant

\_\_\_\_ / \_\_\_\_ / \_\_\_\_  
MM DD YYYY