

Section I – Personal Information

Required

Name: _____ SSN Last 4: _____
First Last

Optional – Helpful for potential follow up

Email: _____ Phone Number: _____

Section II – Group Rollover

I agree to have my University Hospital of Augusta, Georgia Retirement Savings Plan (403(b) Plan) account be included with the group rollover to the Piedmont Healthcare 401(k) Tomorrow Plan.

I have received the special tax notice as a part of the termination notice sent by Piedmont Healthcare in May 2023.

Signature: _____ Date: _____

Section III – Loan Rollover (if applicable)

If you have an existing plan loan from your University Hospital of Augusta, Georgia Retirement Savings Plan (403(b) Plan) it will be included in the group rollover to the Piedmont Healthcare 401(k) Tomorrow Plan. In addition to the Group Rollover Form, you need to also complete a Fidelity Electronic Loan Payment Authorization Form to allow for direct loan payments after the group rollover is completed.

Section IV - Administration

Group rollover is expected to be processed in August 2023. Funds will be invested based on your existing Piedmont 401(k) investment elections and will be available in a Rollover 403(b) source.

Forms can be returned in-person to a Cannon Financial Strategists advisor or mailed to:

*Piedmont Augusta
1402 Walton Way, Augusta, GA 30901
Attn: Cannon Financial Strategists*

The deadline for completing this form and returning it to Cannon Financial Strategists is July 31, 2023.