

Principal Trust Company

A member of



Mailing Address:
P.O. Box 8963
Wilmington, DE 19899-8963
800-209-9010 Fax: 302-999-9554

**Consolidation Request
For Individual 401(k) Plan**

Plan Name:	Investment Firm:
Participant's Name:	Firm Account Number:
Participant's Phone Number:	Participant's Social Security Number:
Account Exec. Name & Phone Number:	

Tell Us About Your Request

Restate my Principal Trust Company profit sharing plan into a Principal Trust Company individual 401(k) plan	
<input type="checkbox"/> In Cash	<input type="checkbox"/> In Kind
Investment Firm Name:	Account Number:
Address:	
Terminate my Principal Trust Company pension plan and roll the assets over to my Principal Trust Company individual 401(k) plan	
<input type="checkbox"/> In Cash	<input type="checkbox"/> In Kind
Investment Firm Name:	Account Number:
Address:	

Signatures

Participant's Signature:	Date:	Signature Guarantee:
Spouse's Signature:	Date:	Signature Guarantee: