



COUNTY *of* VENTURA

Deferred Compensation

Prior Service Purchase

Enclosed in this packet are the following forms:

- 401(k) Shared Savings Plan Prior Service Purchase - Transfer to Qualified Retirement Plan
- Section 457 Plan Prior Service Purchase - Transfer to Qualified Retirement Plan

Use the **401(k) Shared Savings Plan Prior Service Purchase—Transfer to Qualified Retirement Plan** if you want to use funds from your 401(k) Plan account to purchase prior service credit. Only your contributions (source 01) can be used for the purchase of service credit. Employer matching contributions are not eligible.

Use the **Section 457 Plan Prior Service Purchase - Transfer to Qualified Retirement Plan** if you want to use funds from your 457 Plan account to purchase prior service credit. Only pre-tax contributions can be used for the purchase of service credit. Roth contributions are not eligible.

Be sure to include the original signed contract from VCERA, or other qualified retirement plan, when you return your transfer request.

Each transfer request form includes instructions, documentation requirements, and other important information. If you have any questions, call the Deferred Compensation Program at 805/654-2620 or e-mail us at deferred.compensation@ventura.org.