



11410 SW 68th Parkway, Tigard OR 97223  
Mailing Address – PO Box 23700, Tigard OR 97281-3700  
Toll free – 888-320-7377 fax – 503-598-0561  
Website – <https://oregon.gov/pers>



Better TOGETHER.

## OSGP Trustee-to-Trustee Transfer to PERS for Purchase(s)

Use Oregon Public Employees Retirement System (PERS) and Oregon Savings Growth Plan (OSGP) 457(b), form 459-774, to purchase eligible retirement credit. If using a different financial institution to purchase PERS retirement credit, use the [Trustee-to-Trustee Transfer to PERS for Purchase form #459-623](#). Complete Sections A, B, and C and send the form and issued check to the address below.

### Section A: Personal Information

|         |       |                              |                                |
|---------|-------|------------------------------|--------------------------------|
| Name    |       | Social Security Number (SSN) |                                |
| Address |       | PERS ID                      | Phone Number                   |
| City    | State | ZIP code                     | PERS Effective Retirement Date |

### Section B: Transfer Amount

\$ \_\_\_\_\_ (Exact dollar amount) from my OSGP pre-tax account.

### Section C: Authorization

I understand that:

1. The transfer of these funds will remove them as OSGP assets and that it is my responsibility to ensure adequate funds are available\*.
2. After OSGP issues the check directly to PERS, the funds are transferred to PERS, completing the transaction and ensuring timely and secure delivery of the retirement service purchase amount.
3. It is my responsibility to confirm that PERS has received the entire amount of the related purchase prior to my PERS effective retirement date.
4. OSGP recommends at least 60 to 90 days prior to retirement to review and process your retirement forms. This allows follow-up actions or clarifications that may be needed.

Participant's signature (do not print)

Date

### Points to Consider: Transferring Money from OSGP to Fund PERS Purchase

The amount transferred cannot exceed the balance available in your OSGP account or the cost of the PERS purchase. OSGP will make every effort to have your funds transferred in a timely manner, but cannot guarantee a specific transfer date.

This transfer is not considered a taxable distribution from OSGP. Transfers to a member's PERS account made pursuant to this agreement shall be in accordance with the rules and regulations of PERS.

\* If you participate in the Self-Directed Brokerage Option (SDBO) you must ensure that you have transferred adequate funds back into a core fund. OSGP cannot transfer purchase related funds directly from the SDBO.

Submit completed form to:

**Oregon Savings Growth Plan, PO Box 23700, Tigard, OR 97281**

In compliance with the Americans with Disabilities Act, OSGP staff will provide assistance in filling out this form to anyone who needs it. You may request assistance from the OSGP by calling 800-365-8494 or TTY 800-579-5708.

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