Withdraw/Transaction Information

All Transactions require BOTH the completed paperwork from your financial institution and a completed Transaction Routing Request Form. All transactions are handled through TSA Consulting Group. No CCSB employee signature is necessary on these transaction forms. The Transaction Routing Request form provides important information regarding your request and is vital to ensuring proper processing of your request.

You may request a transaction by:

1. Completing the necessary forms obtained from your financial institution.
2. Completing any additional forms depending on type of transaction.
   (See page 2 of the Transaction Routing Request)
3. Complete a Transaction Routing Request Form.
4. Submit ALL completed forms to TSA Consulting Group per instructions on the Transaction Routing Request Form.

Types of Transactions Requested:

- Cash Distribution/Withdrawal - Requires a distributable event(i.e., age eligibility, separation from service, death, or disability)
- 403b Hardship Withdrawal and 457b Unforeseen Emergency Withdrawals - Guidelines for a Hardship Withdrawal can be found online at https://www.tsag.com/documents/Rules_applicable_to_403_b_hardships.pdf
- Rollovers (into and out of the Plan)
- 403b Contract Exchanges/457b Transfer – As of January 1, 2009, participants may only exchange their accounts among the approved vendors in the CCSB 403b Plan (See: Approved 403b Vendor Contact Information)
- Plan-to-Plan Transfers
- Purchase of Service Credit (Transfer)
- Loans

IMPORTANT: If your rollover or withdrawal request is due to the qualifying event of separation from service, your termination date must be verified by your employer. Also a request cannot be submitted until after your termination date.

TSA Consulting Group can assist you by contacting their customer service representatives at 1-888-796-3786 or recordingkeeping@tsacg.com .