

Roll Over Another Retirement Savings Account Into Your Plan Account

A **Rollover** is a tax-free transfer from one retirement savings account to another. Rollovers are a common and popular way of consolidating all of your retirement savings in a single account rather than managing different retirement accounts with different investment providers.

How to complete a Rollover into your plan account

If you have an account balance in a previous employer's retirement plan or in a Traditional/Pre-Tax IRA, you can roll over that balance into your account on this account management user site. To do so, please follow the below instructions:

- Log into your plan account.
- From the menu at the top of the page, go to **Forms & Report-->Forms**.
- Under **Select form group** choose **Rollover Money Into Your Plan** and under **Select form** choose **Rollover Form**, then click **Get Results** (it might take up to one minute for the form to load).
- In the window that appears, click the **Open Form** link to download the form.
- Follow the instructions on the **Making Rollovers Into Your Retirement Plan** page to complete the rollover into your account.

Questions

If you have questions about completing a Rollover into your plan account, please call Client Services at 888-673-5440, Monday through Friday between 8am-8pm ET.