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## ASSET ROLLOVER GUIDE

**To transfer any retirement assets from your traditional IRA (not available for Roth IRA); existing 401(k), 403(b) or 457(b) Plan; or any other Qualified Retirement Plan into your current Employer's Retirement Plan, you must do the following:**

- 1) Contact the Custodian or Financial Services Firm holding your account and request a Rollover Distribution Form. Generally, participant statements display the necessary contact information.
- 2) When completing the form...
  - a) Choose the "Rollover to a Qualified Plan" option so that no taxes are withheld from your distribution.
  - b) Request a Total Liquidation of your account, rather than a Partial or In-Kind Transfer.
- 3) If you choose to have the proceeds sent via check, please request that the check be made payable to the Plan Custodian and reference your Plan's account number. Please contact the RPG Helpdesk for details on your Plan Custodian and Plan account number. Your name and social security number must also appear in the reference/memo section of the check.

The reason the check is made payable to the Plan's Custodian is to prevent any unwanted taxes or penalties. By law you have 60 days to rollover tax-deferred assets from one Qualified Plan to another. If the assets are not rolled over within the 60-day time frame, you may be subject to taxes and penalties. Having the check payable to the Plan Custodian prevents you from taking possession of the assets, thus enabling you to bypass the 60-day rule.

Contact the RPG Helpdesk for your Plan Custodian's mailing address (regular /overnight).

- 4) If you prefer to have the proceeds **wired**, please contact the RPG Helpdesk for your Plan Custodian's wiring instructions.
- 5) Sign and return the form to your account's current Custodian or Financial Services Firm.

If you have any questions, please feel free to contact the RPG Helpdesk.

*Note: Neither RPG Consultants nor its employees provide tax or legal advice. You must consult with your legal and/or tax advisors regarding your personal circumstances.*