

Rollover Instructions

Below is a general overview for participants who want to rollover money from previous employers into current retirement savings plan:

Step One: Participant will need to contact their current provider (*where the account is currently held*) and request distribution paperwork to start the rollover process. The broker might refer to this as a distribution/rollover.

Step Two: Complete the distribution paperwork in its' entirety, if help is needed please contact JFG for assistance. Upon completion submit the distribution request to the provider's preferred address which should be located on the paperwork. *This step initiates the rollover request.*

Step Three: Complete the *Rollover Acceptance Form* located by logging into your account on the web portal **Dashboard Summary > Forms** and submit to your Human Resources department for processing, this form is required and accepts the money into your current retirement plan. **Note:** In limited situations, the provider may require a Letter of Authorization/or Transfer of Assets Acceptance. If this is the case, please let us know and we will prepare the letter for you. A copy of the current retirement savings statement is needed in order to do so.

Processing Instructions for Rollover Check and Mailing Address:

The rollover contribution check(s) should be made payable and sent to:

Mid Atlantic Trust Company
FBO [Participant Name], [Enter Plan Name], [Enter Plan Number]
PO Box 536707
Pittsburgh, PA 15253-5909

Step Four: Once the rollover contribution check is processed, it will be "like invested" according to your current investment allocation. Double check to ensure accuracy by logging into your account online <https://participant.johnsonfinancialgroup.com>

Please reach out to our Participant Service Center with any questions by calling 888.755.3039 or emailing retirementservices@worksaveretire.com