

## Completing a Rollover

While having your savings and investments all in one place may offer many benefits, the decision to make a rollover requires careful consideration. Be sure to review all of your options carefully. For help on choosing the distribution option that is right for you, call 800-835-5095 to speak with a Fidelity Representative. When making a rollover into the Plan, you will need to choose from the investment options offered in the Plan.



### 1. Start the rollover process

- **Online at [www.NetBenefits.com](http://www.NetBenefits.com)** Choose “Rollovers” from the Quick Links menu on your NetBenefits® homepage. Follow the instructions and enter the requested information.
- **By phone: Contact the Service Center at Fidelity for questions on completing a rollover into the Plan.** Call **800-835-5095** Monday through Friday, between 8:30 a.m. and 8:30 p.m. Eastern time.
- **Mobile App:** Log into your account on the Fidelity NetBenefits® Mobile app. Choose “Explore Rollovers” and then follow the instructions and enter the requested information.

If you prefer to complete your rollover with a form, you can download the form from [www.NetBenefits.com](http://www.NetBenefits.com) after logging into your Plan. Go to “Plan Information and Documents” from Quick Links. Then download the “Rollover Form.” You can also contact the Service Center at **800-835-5095** to request a rollover form.



### 2. Request a check from your prior plan administrator

Fidelity does not accept wire transfers of funds. You must request a CHECK from your previous plan. **The check can be made payable to Fidelity Investments Institutional Operations Company, Inc. (or FIIOC), for the benefit of (YOUR NAME).** The check must be from the distributing trustee or custodian. Personal checks are not acceptable. Please review all rollover instructions on NetBenefits or on the Rollover Form before requesting the distribution.



### 3. Complete the rollover process and send funds to Fidelity

Whether completing your rollover online or by form, be sure to provide all requested information about your prior account, including types of contributions (such as pre-tax and Roth).

- **Online:** Provide all of the information requested. A progress bar shows at the top of the page. Use mobile\* deposit to send your rollover proceeds to Fidelity.
- **By form:** Provide all of the information requested. Mail your completed **form and check together** to Fidelity at the address on the rollover form. Incomplete forms and the accompanying check will be returned to you and may jeopardize your ability to roll over your distribution.
- **Mobile App:** Log into your account on the Fidelity NetBenefits® Mobile app. Choose “Explore Rollovers” and then follow the instructions and enter the requested information.

\*Download the NetBenefits mobile app by visiting [Fidelity.com/go/netbenefitsapp](http://Fidelity.com/go/netbenefitsapp), or from the App Store® or Google Play™ Store, and access your workplace accounts anytime, anywhere.

Once your contribution is accepted into the Plan, you can see your rollover contribution and investment election(s) online. Please allow at least seven business days for processing. If you have any questions about rollover contributions, call 800-835-5095. Investing involves risk, including risk of loss.