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Fidelity INVESTMENTS

How To Transfer Or Rollover Retirement Plan Assets To Fidelity

We understand that initiating a transfer or rollover can be overwhelming. Fidelity has licensed representatives available to help you.

- The transfer or rollover request will require forms from both Fidelity and your other account vendor.
- Fidelity representatives are available to provide you with the Fidelity form, assist you with the necessary paperwork from each vendor, and set appropriate expectations for completion of your request.
- Fidelity can assist you from the beginning to the end of the process to ensure an accurate transfer or rollover of your funds into your Fidelity account.
- Questions? Contact your Fidelity Representative and have your statement from your prior vendor ready for assistance.

If you have questions on the paperwork, you can contact
Teri Jones, a Fidelity Representative,
at 1-866-921-4845, to schedule an appointment.

Call or write Fidelity for a free prospectus. Read it before you invest.

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