



Asset Rollover Instructions

To transfer funds from an existing IRA, 401(k) or Other Qualified Plan into your current Retirement Plan, please do the following:

- 1) Contact the Custodian or Financial Services Firm holding the money that you would like to transfer and request a Rollover Distribution Form. Generally, participant account 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, request that the check be made payable to your Plan’s Custodian, not to RPG Consultants. If you do not know who your Plan’s Custodian is, contact the RPG Helpdesk for that information. Your name, social security number, Plan name and account number should appear in the memo section of the check. The reason the check is made payable to the Plan’s Custodian is to prevent any unwanted tax penalties. By law, you have 60 days to roll tax-deferred funds over from one qualified plan to another. If the funds are not rolled over within the 60-day time frame, you may be subject to a tax penalty. Having the check payable to the Plan’s Custodian prevents you from taking possession of the money, and thus enables you to bypass the 60-day rule.

Please contact the RPG Helpdesk if you do not have the mailing address for your Plan’s Custodian. If you prefer to wire the funds, contact the RPG Helpdesk for wire instructions.

- 5) Sign and return the form to the current Custodian or holding firm from where you received it from in # 1 above.
- 6) If you have any questions, please feel free to contact the RPG Helpdesk.

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.

Long Island
181 S. Franklin Ave, Suite 202
Valley Stream, NY 11581

212.947.4800 ph • 212.947.4866 fx
info@rpgny.com • www.rpgny.com

New York City
5 Penn Plaza, 23rd Floor
New York, NY 10001