



Rollover-In (Incoming Assets) Form

Phone: (855) 616-4776 • savingsplusnow.com

Processing will be completed within 3-5 business days of receipt of a properly completed and signed form.

1. Participant Information

Name: _____ Account Number or SSN: _____

Email: _____ Preferred Phone: _____

Phone type: Home Work Cell

2. Source of Rollover-In Assets

- 401(k) Roth 401(k) 403(b) Deemed IRA
- 457(b) Roth 457(b) Roth 403(b) Traditional IRA Other: _____

NOTE: You cannot roll pre-tax money into an Roth account or Roth money into a pre-tax account.

Surrendering Carrier Information:

Carrier Name: _____ Account Number: _____

Mailing Address: _____

City: _____ State: _____ ZIP: _____

Contact Name: _____ Contact Phone: _____

3. Rollover-In Information

Have you already completed all requirements and funds are on the way to Nationwide from the prior Provider/Custodian?

- Yes, you may skip down to Next Steps.
- No, you may answer the questions below and Nationwide will help facilitate your rollover.

The Provider/Custodian who currently holds your assets will likely have their own requirements to complete the rollover-in. You will need to contact them to obtain their rollover-out requirements and get the information needed in the **Deposit Rollover Assets To** section on the next page. When you contact them, please ask the following questions and mark the answers below:

Does the Provider/Custodian:

- Require their own paperwork **OR** Accept Nationwide's paperwork
- Require original signatures **OR** Accept electronic signatures on forms
- Require a Letter of Acceptance?
- Accept email copies of paperwork?
- Accept faxed copies of the paperwork?
- Require notarization of signatures?
- Require medallion signature guarantee?

Next Steps

- Return this form and all paperwork from your prior Provider/Custodian (if required) to Nationwide using the fax or address below. Receipt of this paperwork will initiate your request to move funds from an outside qualified plan or IRA into your retirement account with Nationwide.
- If funds are not already in transit to Nationwide, we will forward all paperwork to the relinquishing Provider/Custodian. We will follow up to ensure receipt and make sure your outside account is transferred to your Savings Plus account administered by Nationwide. Please note it may take up to 90 days for certain account types to be transferred.
- If you have any questions or received notification of additional requirements from the relinquishing provider/custodian please contact us at (855) 616-4776.

