

## 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.

Account Number or SSN:		
Preferred Phone:		
Phone type:	] Home ☐ Work ☐ Cell	
2. Source of Rollover-In Assets		
☐ Deemed IRA ☐ Traditional IRA ☐ Other: _ ount or Roth money into a pre-tax acco	ount.	
arrier Name: Account Number:		
Contact Ph	ione:	
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 <b>Deposit Rollover Assets To</b> section on the next page. When you contact them, please ask the following questions and mark the answers below:		
lationwide's paperwork lectronic signatures on forms		
	Preferred Phone:Phone type:Phone type:	

## **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.

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4. Deposit Rollover Assets To	
$\square$ 401(k) $\square$ 401(k) Roth $\square$ 457(b) $\square$ 457(b) Roth NOTE: You cannot roll pre-tax money into an Roth account or Roth n	noney into a pre-tax account.
Estimated Amount of Rollover-In: \$	
Are you rolling over Roth assets? $\square$ Yes $\square$ No (If No, skip to Sect	ion 5)
If Yes, Roth Basis (total contributions without earnings): \$	
Year of First Roth Contribution:	
5. Instructions for Rollover	
Provide the following information to your prior qualified plan or IRA For a rollover sent via Wire or Credit ACH:  ABA: 021000021 Acct: 900-9000-127  Name: PTFS Operations FFC: P35663/(SSN or Participant Name)	provider:
For a rollover sent via check:	
Make check payable to:Standard Mail:NationwideNationwide Retirement SolutionFBO (SSN or Participant Name)PO Box 183150 Columbus, OH 43218	Overnight Mail:  1 Nationwide Plaza Attn: 1-LC-F2 Columbus, OH 43215-2239
6. Investment Direction for Rollover (select one)	
☐ Invest my rollover according to my current investment allocation of Invest my rollover to the Target Date Fund in accordance with my <b>NOTE:</b> If you do not indicate your investment direction, Savings Pl corresponding with your Date of Birth. Fund Fact Sheets are located a section.	Date of Birth. us will invest your rollover in the Target Date Fund
7. Authorization	
By signing below, I understand that my Rollover-In will become subject that I satisfy the requirements for making this Rollover-In and this replacements are not provided is entitled to rely fully on my certification. I expressly assume any tax consequences relating to this Rollover-In and I agree Nationwick	epresents an amount which is eligible for Rollover-In he responsibility for the eligibility of this Rollover-In and
I hereby request my funds to be allocated and invested as directed impose a short term trading fee. Please read the underlying Fund Fac	
Nationwide hereby agrees to accept the Rollover-In described hereifive business days in your account.	n and upon receipt will deposit the proceeds within
Participant Signature:	Date:
A Medallion Signature Guarantee may be required.	
Please contact your surrendering financial institution to confirm.	Medallion Signature Guarantee Stamp Here