



Roll over money into your retirement plan

Have money in a former employer's retirement plan or IRA? You can make it easier to manage all your savings by moving that money over to your current employer's plan.

Here's how to move money from your old plan to your current plan at Vanguard. By following these steps, you won't have to pay taxes on the rollover. If you have any questions along the way, give us a call at **800-523-1188**.

1. Contact the other financial institution.

Have the company that manages your old plan or IRA send a check directly to you. Ask the company to make the check payable to:

Vanguard Fiduciary Trust Company, For the benefit of [*Your Name*]
(VFTC, FBO [*Your Name*])

When you get to step 2 on the other side of this page, you'll need to provide us with some information about the money you are rolling over. So when you contact the company, ask which types of money (pre-tax, Roth after-tax, or traditional after-tax) you have in your account. Also ask for the information listed in the table below. Write down all the information.

If you have Roth or traditional after-tax money, ask the company to also include this information with the check.

If you have ...	You'll need to ...
Pre-tax	Write down this amount.
Roth after-tax	Write down the Roth amount, your cost basis, and the date of your first Roth contribution. Ask the company to include this information with your check.
Traditional after-tax	Write down the traditional after-tax amount and the cost basis. Ask the company to include this information with your check.

2. Complete your rollover form.

Log on to your account at vanguard.com/retirementplans and complete the form to roll over money to your current employer's retirement plan.

After you complete the form, you'll need to print it out.

3. Mail the rollover check and form to Vanguard.

When you receive your check, mail it with the form to one of these addresses:

For standard U.S. mail

Vanguard
Attn: DC
P.O. Box 982902
El Paso, TX 79998-2902

For registered, certified, or overnight mail

Vanguard
Attn: DC
5951 Lockett Court, Suite A2
El Paso, TX 79932

Need help?

We're with you every step of the way. Just give us a call at **800-523-1188**. We're available Monday through Friday from 8:30 a.m. to 9 p.m., Eastern time.

Connect with Vanguard® > vanguard.com/retirementplans > 800-523-1188