daybright™ FINANCIAL

previously INGHAM RETIREMENT GROUP

Roll Over Another Retirement Savings Account Into Your Plan Account

A **Rollover** is a tax-free transfer from one retirement savings account to another. Rollovers are a common and popular way of consolidating all of your retirement savings in a single account rather than managing different retirement accounts with different investment providers.

How to complete a Rollover into your plan account

If you have an account balance in a previous employer's retirement plan or in a Traditional/Pre-Tax IRA, you can roll over that balance into your account on this account management user site. To do so, please follow the below instructions:

- Log into your plan account.
- From the menu at the top of the page, go to ***Forms & Report-->Forms.***
- Under ***Select form group*** choose ***Rollover Money Into Your Plan*** and under ***Select form*** choose ***Rollover Form***, then click ***Get Results*** (it might take up to one minute for the form to load).
- In the window that appears, click the ***Open Form*** link to download the form.
- Follow the instructions on the ***Making Rollovers Into Your Retirement Plan*** page to complete the rollover into your account.

Questions

If you have questions about completing a Rollover into your plan account, please call Client Services at 888-673-5440, Monday through Friday between 8am-8pm ET.