

IRA Rollover Instructions for your 401(k)

Rollover specialist: 1.877.464.0292

- 1 OPEN** a ShareBuilder IRA (Traditional/Rollover, Roth).
- 2 CONTACT** your former employer to complete a copy of their Distribution/Rollover form.
- 3 PROVIDE** the information below to your employer or plan administrator.

Send the following information to your 401(k) Plan Administrator:

"TO" (ShareBuilder account receiving rollover proceeds)

Account type: Traditional/Rollover Roth

ShareBuilder Account Number: _____ - _____ - _____ (example: 1000-1234567890-01)

Account Owner:

Rollover Proceeds Instructions

Liquidate all assets and send check to ShareBuilder.

Make check payable to ShareBuilder Securities, fbo (Please indicate the above account number on the check.)
Customer name



MAIL check to:
ShareBuilder Securities Corporation
 Attn: Direct Rollover Processing
 P.O. Box 4249
 Seattle, WA 98194-0249