



# Roll over funds and realize the simplicity of one account

If you still have a retirement plan account from a previous employer, it may be difficult to keep track of how you're doing. Think about rolling your retirement accounts from previous employers to your Empower plan.

## **Simplify**

Instead of dealing with multiple statements, websites and service centers, simplify with:

- One statement to reduce clutter.
- One website username and password to remember.
- One Customer Care Center to call.

## **One view**

Our retirement income projection tool may give you a more accurate picture of your financial future by allowing you to quickly view your projected monthly income in retirement and see if you're on track to reach the future you want.

## **How to roll over funds**

Here's all you need to do.

- Request a distribution from your previous plan.
- Complete the Empower rollover paperwork.
- Return the check and paperwork to the address on the form.

You can view more details about these steps on the back of this page.

You also have other options. You could keep your money in your previous employer's plan, move your money to your new employer's plan or withdraw it. Keep in mind that you may be subject to stiff IRS tax penalties and possible early withdrawal penalties. Consider all your options and the features and fees before moving money between accounts.

## Details about how to roll over funds

### ➤ Complete the application and certification forms

You can access these forms by logging in at **empowermyretirement.com**. Once logged in:

- Select *Statements and documents* under the *Account* tab.
- Click on *Plan forms* on the left-side menu under *Plan information*.
- Open and complete the forms.

### ➤ Request a distribution from your previous plan

In most cases, you can request a distribution by phone or online. Check your last statement for contact information.

The distribution check should be made payable to:

Great-West Trust Company, LLC for the benefit of (FBO)  
(insert your name)

Please include the retirement plan's name on your check.

### ➤ Mail everything to us

Mail your completed rollover application, rollover certification and distribution check to the mailing address listed on the form.

You'll receive a Form 1099-R for the amount of the rollover that must be reported on your tax return.

Call **888-737-4480** if you need help.

➤ Get started at **empower.com** or call **888-737-4480**

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