

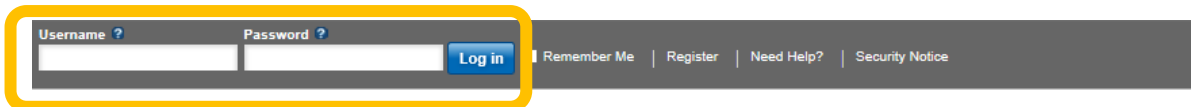
Indiana University Retirement Plans

ONLINE ROLLOVER PROCESS

If you would like to roll over assets from another retirement plan into an eligible IU retirement plan, you can initiate the process online at Fidelity NetBenefits® by following the steps below.

STEP 1 Log on to Fidelity NetBenefits®.

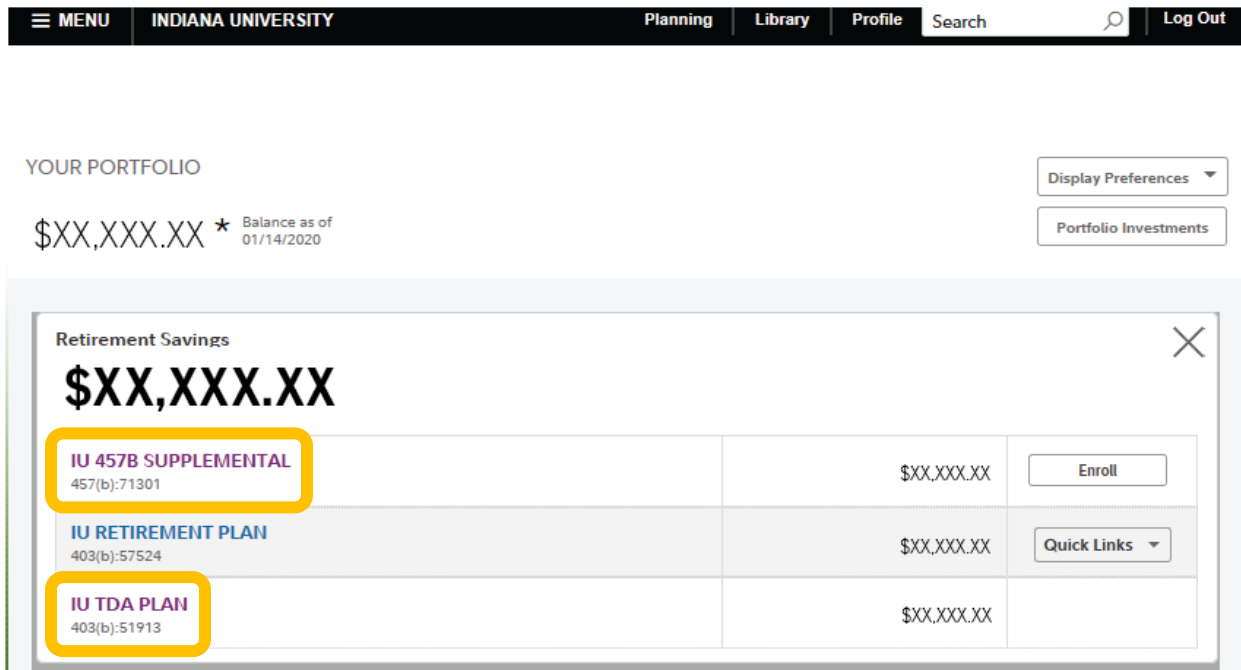
Go to [NetBenefits.com/Indiana](https://netbenefits.com/indiana) and enter your username and password. Then, click the **Log in** button.



Username ? Password ? Remember Me | Register | Need Help? | Security Notice

STEP 2 Select your plan.

Click the plan name you intend to roll into. The online rollover process is currently available for the “IU 457B SUPPLEMENTAL” and “IU TDA PLAN.” Note that if you are not already enrolled in the plan, you must do so prior to initiating the rollover process.



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YOUR PORTFOLIO Display Preferences ▾

\$XX,XXX.XX * Balance as of 01/14/2020 Portfolio Investments

Retirement Savings			
IU 457B SUPPLEMENTAL 457(b):71301		\$XX,XXX.XX	<input type="button" value="Enroll"/>
IU RETIREMENT PLAN 403(b):57524		\$XX,XXX.XX	<input type="button" value="Quick Links ▾"/>
IU TDA PLAN 403(b):51913		\$XX,XXX.XX	

STEP 3

Initiate the online Rollover process.

Choose the **Rollovers** tab and then click the **Roll Over to Plan** button.

Summary Investments Withdrawals/Loans **Rollovers** Bank/Tax Information Plan Information

START A ROLLOVER VIEW PENDING

Rolling money from another retirement plan?

For contract exchanges or transfers, please contact us at 800-343-0860.

[How do you know whether it's a rollover, transfer, or contract exchange?](#)

Your Plan	An IRA
<ul style="list-style-type: none">You can pick from funds that IU TDA PLAN has selectedTaxes aren't due unless you withdraw the moneyYour plan may allow you to take a loan from your retirement planIt offers broader creditor protection under federal law than an IRAYour plan may allow you to roll over only certain contribution types (e.g., pre-tax or Roth)	<ul style="list-style-type: none">With an IRA, you can pick from a wide variety of investment choices including mutual funds, stocks, bonds, ETFs, and moreTaxes aren't due unless you withdraw the moneyYou can take penalty-free withdrawals for certain first-time home purchases or education expenses if you're under 59 1/2You can roll over all contribution types to an IRANote: You can choose to work with different financial service provider if you want to roll your money into a non-Fidelity IRA. Your employer does not endorse any specific provider.

Roll Over to Plan Roll Over to a Fidelity IRA

STEP 4

Choose where the money is currently held.

Click the radio button that corresponds with the type of account that is transferring and then click **Continue**.

Where is the money now ?

You may find this information on a printed or online statement.

Held in an IRA

Held in an previous employer's plan

In IU TDA PLAN , but held with another retirement provider

Continue

STEP 5 Complete the online steps.

Depending on the type of account being transferred and whether or not you have a physical check for the balance you wish to roll into the IU retirement plan, you will be prompted to input additional information and/or provide certain details. Keep in mind that completing your rollover may take a few weeks. Below is a list of some of the items you may be asked to provide, verify, or request from your financial institution during the process:

- ✓ Your contact information
- ✓ Your contribution information
- ✓ Details of the plan account being transferred
- ✓ Check for the balance of the plan being transferred

Questions?

Fidelity is here to help.

Call Fidelity at **800-343-0860** for assistance.

To make an appointment, call the Fidelity reservation line at **800-642-7131**, go online to the Fidelity reservation system at **getguidance.fidelity.com**, or text **MeetAtIU** to **343-898**.[^]

Be sure to consider all your available options and the applicable fees and features of each before moving your retirement assets.

Investing involves risk, including risk of loss.

[^]Message and data rates may apply. Get details at <http://pages.fidelityinvestments.com/smsee>.

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