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](http://NetBenefits.com/Indiana) and enter your username and password. Then, click the Log in button.

**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.
**STEP 3** Initiate the online Rollover process.
Choose the **Rollovers** tab and then click the **Roll Over to Plan** button.

**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**.
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.