



## **5 Easy Steps to Rollover Your Account**

The following are easy steps to assist you in rolling over retirement plan balance or Individual Retirement Account ("IRA").

\_\_\_\_\_ 1. Complete the personal information section of the forms given to you by your Cannon Financial Strategists Representative. \*\*\*Cannon Financial Strategists, Inc. will complete the remaining sections.\*\*\*\*

\_\_\_\_\_ 2. Contact your former plan provider (i.e. Fidelity, Valic, Vanguard). The prior plan provider's phone number can be found on your quarterly statements.

Plan Provider? \_\_\_\_\_ Ph#? \_\_\_\_\_

\_\_\_\_\_ 3. Ask your former provider or former employer for the following:

- Please send "me" the forms needed to rollover my account to my new employer's retirement plan.
- Will there be any surrender charges to move my account? (\*Please see footnote below)  
\_\_\_\_\_ \*Yes          \_\_\_\_\_ No          \_\_\_\_\_ \*Not Sure
- If yes: Ask what the charges are?: \_\_\_\_\_
- When will they no longer apply? \_\_\_\_\_

\_\_\_\_\_ 4. Once you receive the forms you will only need to complete the Personal Information section and sign. [*Cannon Financial Strategists, Inc. will complete the remaining sections.*]

\_\_\_\_\_ 5. Mail the prior plan provider's forms, forms provided by Cannon, and a copy of your prior plan provider's statement to:

Cannon Financial Strategists  
Attn: Rollover Division  
649-8 S. Milledge Ave.  
Athens, GA. 30605

**OR**

You may bring all forms to your retirement meeting scheduled through Human Resources

If we need any additional information we will be in touch. You may receive confirmations in the mail from your prior plan provider and from Cannon or your new provider once funds are received.

If you have any questions please feel free to call Cannon at 888-685-4524 and ask for the Rollover Division or you may contact your Cannon representative.

*\*-If there are surrender charges on your old plan it would be prudent to review these charges with your Cannon representative before proceeding with the rollover. We may recommend that you wait until the surrender period is up before moving your money*