



Self Directed IRA

S E R V I C E S I N C

A subsidiary of Horizon Bank

Helpful Hints for Rolling Over Employer-Sponsored Plans

401(k)s, 403(b)s, Pension Plans, etc.

- Always insure that your funds are eligible to be rolled over to an IRA. Contact your HR representative or the administrator of the plan for verification of rollover eligibility.
- If you are eligible to rollover your funds, the next step is to acquire any necessary paperwork from the plan administrator. Normally, employer-sponsored retirement plans will require that you complete their distribution/rollover documents in order to move the funds.
- Checks should be made payable to: Self Directed IRA Services, Inc. FBO (Your Name) IRA.
- If the plan administrator sends a check directly to you, you will then have 60 days (Starting the day after you receive the check) to rollover those funds to your new IRA and avoid any negative tax consequences.
- If the rollover check is made payable directly to you, you can endorse the check over to your IRA (using the payee information given above) or you can deposit the rollover check and write a new check to your IRA.
- If you need any information from Self Directed IRA Services, Inc. in order to complete the rollover, please contact us at (866) 928-9394. We will be happy to help.