How to transfer your old retirement account into your new account with JH Pierce Wealth Management

I. Your new account with JH Pierce Wealth Management will need to be opened first so the money has somewhere to go. You will need your account number and type.

   My account number is: ____

   My account type is: ____

II. Call the customer service line to your old retirement account, which should be listed on your statement. You will either enter the prompts for, or ask for, "rollover my account."
   Be careful! Some 401(k) or retirement account providers will try to get you to set up an account with them to transfer it into. You will not want to choose that option.

III. Most providers will ask for your new account number (written above), and where to send the check. You will have them send the check to:

   TD Ameritrade
   7801 Mesquite Bend Dr
   Ste 112
   Irving, TX 75063-6043

   Be Careful! Do not have them write the checks out to you and mail them to your house. You can have the check mailed to you, and you forward it on as long as the check is written out to TD Ameritrade, Cust: [your name] IRA, [your account number].

IV. They may ask for your account type (i.e. Roth IRA, Rollover IRA, etc.), if so tell them what you have written above.

V. Once you are done, send Josh an email that you have completed the rollover request.

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