

# The value of rollovers. Your retirement plan.

**You can transfer funds from another account — a previous employer-sponsored plan or individual investment — into your retirement plan here at work.**

Many types of qualified retirement plans, such as IRAs, 401(k)s, 403(b)s, SEPs and pension plans can be rolled into your new retirement plan with us. Understand the advantages of consolidating your funds into one account.

## Why do a rollover?

### 1. Make it easy to manage your retirement funds.

Organize your funds within one account. It's easier than logging into various websites and keeping up with multiple quarterly statements. Our plan through CUNA Mutual Retirement Solutions includes an easy to use tool called RetireOnTarget®. See a snapshot of your retirement savings progress, track your goals, and stay on target.

### 2. Invest with one coordinated strategy.

Your plans may have different investment options and this can make it difficult to manage your overall strategy. Bringing together your funds makes it easy to set and track your overall strategy and make changes as you progress through life.

### 3. Consolidate your costs.

Why pay fees for multiple plans? Our group retirement plan provides you access to institutional investment options that could be lower cost than you can get elsewhere.

### 4. Have access to a range of distribution options.

You may have distribution options available within our plan that are no longer available in your prior employer's plan — or in other investments.



## Is a rollover right for you?

You'll want to compare plan options, investments and costs, and consider the benefits in making your decision.

**Make it easy.**

**Call the Investor Guidance  
Center at 800.999.8786.**

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