

The value of rollovers.

Help employees and strengthen your plan.

SPONSOR SOLUTIONS

Your employees need to understand how your retirement plan works in order to make the most of this important benefit.

New employees may get distributions from previous employers' plans that they'll want to roll into your plan. Other employees may have IRAs or prior employer plan assets to consolidate in your plan.

In spite of the benefits, rollovers can be difficult to process and sometimes they just don't happen.

CUNA Mutual Retirement Solutions can help make it simple.

Let the Investor Guidance Center take the task off your plate and give your employees a resource to call for one-on-one support. This team of skilled representatives can help your employees:

- Compare their prior employers' plans (or IRAs, etc.) to your retirement plan
- Understand the advantages and any disadvantages to rollovers being considered
- Complete their rollover paperwork.

Understand how employees benefit from consolidation.

By having their retirement savings consolidated in your retirement plan, your employees can more easily and effectively manage their retirement funds and invest with a coordinated strategy. They can save on costs and access a range of distribution options that might not be available to them, otherwise. The Benefits for You website provides employees a real-time snapshot of their retirement savings progress with robust planning and tracking features in the RetireOnTarget® tool.

The plan benefits, too.

Your plan can also grow healthier as participants consolidate. As your plan size grows, you may also qualify for additional discounts that can benefit all your employees.



Encourage consolidation right from the start.

Educate your employees with simple material on the benefits of rollovers into your retirement plan.

Include a [one-page overview](#) on rollovers for new hires in your new employee onboarding packets. Make a [general overview](#) on rollovers available for all employees.

Have them call us at
800.999.8786.

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