

Combine Your Old 401(k) Into One Convenient Account

With Fisher Investments on your side, it's easy to combine your old 401(k) accounts and put your retirement savings in one place. Our experienced specialists walk through the process with you side-by-side, making each step clear and simple.

Here's how it works and why you should call us today at 888-322-7586.

Step 1: Make Contact

Call us to get started, and a member of our service team will set up a three-way call with your old 401(k) provider to determine what documentation we'll need.

888-322-7586 |
contact401k@fi.com



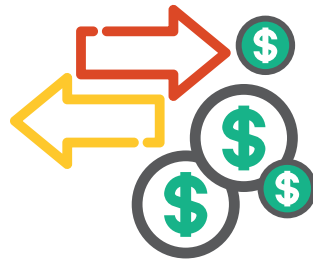
Step 2: Gather Info

Your service team member will help you complete the required documents and get them submitted.



Step 3: Transfer Funds

We will monitor the process while your former 401(k) provider transfers the funds into your new account, and reach out to you to sign the Transfer Acceptance form.



Step 4: Complete!

When the funds are deposited into your new 401(k) account, we'll reach out to let you know they're available to view within your online account. It's that easy!



Why combine retirement accounts?

Moving your old 401(k) account balances into your Fisher Investments account has many benefits, including:



Easy Access: Keep everything in one place with one statement, one login, and one password to remember.



Investment Focus: Put more power behind your account's investments, giving your entire savings greater potential for growth.



We'll help: With our help, rolling old accounts over into your new one is quick and easy.