

Combine Your Retirement Accounts



Follow this Simple Rollover Checklist

Looking to consolidate or “roll over” a retirement account into your current employer-sponsored retirement account? Follow our simple 3-step checklist to get started.



Contact Your Old Service Provider

- Confirm transfer process and follow instructions
- Confirm account balance
- Provide the check payable information as follows:

Paychex FBO [Your First Name] [Your Last Name]



Complete Paperwork with Paychex

- Fill out rollover paperwork
 - Visit their website or call them for a copy of the paperwork
- Submit completed paperwork



Monitor the Status of Your Deposit

- Visit paychexflex.com to check the status or contact Paychex at 877-244-1771



Need Assistance? If you have questions, we can help.
Contact us at **888-322-7586** or contact401k@fi.com.