Fisher Investments®
401(k) Solutions

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:

Principal Life Insurance Company FBO [Your First Name] [Your Last Name]

Complete Paperwork with Principal

- [ ] 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 principal.com to check the status or contact Principal at 800-547-7754

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

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