



**PUBLICIS
RE:RESOURCES**

Fidelity 401(k) Electronic Rollover



Step 1

Log into Fidelity and select Rollovers in the dropdown

You can start this process after your second week at the company (when you are added to the Fidelity system).

The screenshot shows the Fidelity website interface for a 401(k) plan. At the top, there is a navigation bar with 'MENU', 'PUBLICIS', 'Planning', 'Learn', 'Profile', a search bar, and 'Log Out'. Below this, the plan name '401(K):PUBLICIS BENEFITS CONNECTION 401(K) PLAN' is displayed with a 'View Summary' link. A 'Display Preferences' dropdown is visible in the top right. The main content area features a message: 'You're doing a great job saving! Now, let's propose an investment strategy to help you stay on track.' Below this is a section titled 'Your financial wellness journey' and 'Your retirement goal'. A central widget shows a 'Contribution rate' of 8% (\$372 per paycheck) with a 'Take action' button. A progress bar below shows 'Balance today' at \$179,606.72, 'Projected balance at 45' at \$303,520, and a 'Milestone' of '4x' (4x your salary at 45) at \$488,000. A 'Quick Links' dropdown menu is open, listing various options, with 'Rollovers' highlighted. Other options include Summary, Transaction History, Statements, Contribution Amount, Investment Performance and Research, Change Investments, BrokerageLink, Loans or Withdrawals, Bank/Tax Information, Plan Information and Documents, and Personalized Planning & Advice. A 'Portfolio Investments' button is also visible. At the bottom of the screenshot, it says 'Based on what we know about you, here are some suggestions:'.

Step 2

If you have your check, select Yes and then Get started

You also have additional resources here

Summary Contributions Investments Withdrawals/Loans Rollovers Bank/Tax Information Plan Information

START A ROLLOVER VIEW PENDING

Rollovers

If you want to move money to your employer's retirement plan, an individual retirement account (IRA), or another financial institution, we'll walk you through the process. Usually, there are no taxes on a rollover. Before moving your money, consider all the fees and features of your rollover options.

Questions about moving your money? [See frequently asked questions](#)

I want to move money:

Into my PUBLICIS BENEFITS CONNECTION 401(K) PLAN retirement plan Selected

OR

Out of my PUBLICIS BENEFITS CONNECTION 401(K) PLAN retirement plan Select

Move money into my PUBLICIS BENEFITS CONNECTION 401(K) PLAN retirement plan

We're here to walk you through the rollover process. First, we need to determine where you are in the rollover process, which usually begins when you request a check from your former employer's retirement plan.

Do you have a check from your former employer's retirement plan?

Yes

No

No, but I requested it

It was sent to Fidelity

Step 3




There are step-by-step instructions for getting you set up from here

PUBLICIS BENEFITS CONNECTION 401(K) PLAN [Need Help?](#)

Roll Into Your Plan

What's involved?

Completing a rollover may take a few weeks. Here's an overview of what to expect. Don't worry, we'll walk you through each step in detail. Before you get started, it is helpful to have an old statement available.

- **Confirm your contact information.**
This is how we'll keep you updated. (About 2 minutes)
- **Provide contribution information.**
We'll need to know the amount and tax breakdown of the check. This may require another call to the company that manages your old plan. (About 20 minutes)
[Will you have to pay taxes?](#)
- **Send your documents**
You can send them with the NetBenefits app (1-2 business days to process). Or mail them (1-2 weeks to process).

[Get Started](#)

[Return to Account Summary](#)

If you have any questions or issues along the way, contact Fidelity at 1-800-835-5095.