

This form should be used to transfer money from an existing qualified retirement account to your SaveDay 401(k) account. You can rollover an account from an employer-sponsored plan such as a 401(k), profit sharing, or pension plan to SaveDay. If you need help completing the form, please contact SaveDay. Please note, if you have multiple accounts to rollover please use one form for each.

## Your Information

Last Name		First Name	
Legal Address			
City		State	Zip
Phone		Email	
Current Employer			

## Account you want to transfer

Please provide information about the account you wish to transfer to SaveDay <b>Note:</b> The entire account will be liquidated and transferred to SaveDay. If you would like other arrangements please contact SaveDay.			<b>Cash Amount to Transfer</b>		
<b>Account Number</b>			<b>Account Registration/Title</b>		
<b>Social Security Number</b>			<b>Delivering Institution Name</b>		
<b>Select one Plan/Account type:</b>	<input type="radio"/> 401(k)	<input type="radio"/> SEP IRA	<input type="radio"/> SIMPLE IRA	<input type="radio"/> Traditional IRA	
	<input type="radio"/> ROTH IRA	<input type="radio"/> Rollover IRA	<input type="radio"/> 403(b)	<input type="radio"/> 457	

## Acknowledgement

By signing this form, I hereby certify the following:

- Direct SaveDay and its partners and the delivering institution to act on all the instructions given on this form.
- I will rollover these funds within the 60 days of the date from when I received my funds from my prior account.
- The Rollover funds come from the sources mentioned above and does not include funds from sources that may disqualify it.
- No portions of these funds were received as a hardship withdrawal from another employer's plan.
- I am aware of any tax or financial implications that may arise in connection with this transfer or with the sale or liquidation of any assets prior to transfer, including penalties, fees, financial losses, or losses of product features or benefits
- I understand that if I don't currently have a plan account, an account will be established for my rollover contribution. My rollover contribution will be invested in accordance with my investment election on file.
- I authorize the delivering firm to deduct from my account any fees that owed, and, if necessary, to sell assets in my account to pay those fees

Your Signature: \_\_\_\_\_

Date: \_\_\_\_\_



## Step 1. Complete the Rollover Form

Please complete the Incoming Rollover Contribution Form. Please be sure to complete all items, and sign the form where indicated. If you are not sure of the plan type that you are rolling out of, please contact your previous Plan Sponsor or IRA custodian for verification. An incorrect plan type could invalidate your rollover.

## Step 2. Request the rollover check

Please request a direct rollover distribution from the institution that currently administers your account. See the Incoming Rollover Form for a list of the types of plans or accounts that are eligible to rollover to your SaveDay account.

Instruct the institution that currently administers your account to make the check payable to:

**APEX Clearing  
For the Benefit Of:**

Memo

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Your Name on the Account

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Your SaveDay Account Number

## Step 3. Send the completed form, Check, and statement

A. Please send your completed rollover form along with your most recent account statement for the account you want to move to SaveDay.

Mailing Address:

**SaveDay, Inc.**  
1159 Sonora Court, Suite 104  
Sunnyvale, CA 94086

Email:

request@saveday.com  
Subject: Incoming Rollover Form

B. **Mail** the incoming rollover contribution check to:

**Regular Mailing Instructions:**

Apex Clearing c/o BPO  
2 Gateway Center  
16th floor  
283-299 Market St.  
Newark, NJ 07102-5005  
Attn: Treasury Department

**Overnight Mailing Instructions:**

Apex Clearing c/o BPO  
2 Gateway Center  
16th floor  
283-299 Market St.  
Newark, NJ 07102-5005  
Attn: Treasury Department

Questions? If you have any questions regarding the form or instructions, call us at 1-650-684-7283, Monday through Friday, 8:00 a.m. to 5:00 p.m. Pacific Time

