

### **Direct Rollover/Transfer/Distribution Instructions**

Once your Rollover IRA account has been opened at TD Ameritrade, please request your current 401K plan trustee/custodian to initiate a "Direct Transfer/Distribution" (you will likely have to fill a one/two page form from the current 401k plan trustee) with the following details:

<u>Your Rollover IRA A/c No at TD Ameritrade=</u>	240xxxxxx
<u>A/c Name=</u>	Your Name Rollover IRA
<u>Trustee/Custodian=</u>	TD Ameritrade Inc
<u>Address=</u>	TD Ameritrade Clearing Inc., Advisor Services, P.O.Box 650567, Dallas, TX 75265-0567.

If the 401k plan trustee has any questions, they may contact: 1-888-376 4112 > Client Service. **Please do make sure that they do not issue the distribution in your name but to "TD Ameritrade Inc".**