

# EMPLOYEE 401(K) ROLLOVER GUIDE

**Betterment**  
For Business



## 401(k) Rollover Steps

1. To get started, please log in to Betterment from a web browser.
2. Next, select Transfer or rollover > Rollover to Betterment > 401(k) rollover.

*Please Note: If your current 401(k) account contains mixed funds, you will need to follow the above directions twice, once for the Traditional portion of your rollover, and again for the Roth portion.*

3. After answering some prompts detailing the funds you wish to transfer, a PDF form will be generated which will list how to make the check payable and where to mail the check.
4. You can always reference this form within your account by navigating to **Documents > Other Documents**.
5. Contact the provider where your 401(k) funds currently are. You will have to initiate a distribution with them. Your provider will either send a check directly to Betterment or they will mail the check to your address.
6. If applicable, mail your check to Betterment for deposit. The mailing address can be found on the PDF that was generated after step 3.

**Betterment**  
For Business