



Rollover to Lineage Logistics 401(K) with Vanguard:

1. Call your prior 401(K) carrier and let them know you want to initiate a rollover to Vanguard.
 - a. Have them make the check payable to: Vanguard Fiduciary Trust Company, For the benefit of [Your name] **OR** (VFTC, FBO [Your name])
 - b. **IF** you are rolling over Roth/after-tax monies please note this additional step when speaking to your prior carrier:

Roth	<ul style="list-style-type: none">• Write down the Roth amount, <u>cost basis</u> and <u>Roth start date</u>• Ask them to include this information on your check or on a letterhead included with your check.
After-tax	<ul style="list-style-type: none">• Write down the after-tax amount and <u>cost basis</u>• Ask them to include this information on your check or on a letterhead included with your check.

- c. Have the rollover check sent directly to you
 - d. Once you have the check you can start the rollover process with Vanguard (step 2)
2. In order to complete an online rollover request go to:
<https://retirementplans.vanguard.com/VGApp/pe/PublicHome#/>
 - a. Create an account **OR** sign in if you already have a username and password
 - b. Click on Manage my Money at the top of the page
 - c. Click Transfer Assets in (under quick links of the right side of the page)
 - d. Choose step 2
 - e. Answer all the questions
 - i. What type of account are you rolling over
 - ii. How are you sending the money
 - iii. What type of money are you rolling (pre-tax or roth)
 - iv. Click Continue to Rollover Form
 - v. Enter the amount you are rolling over
 - vi. Continue
 - vii. Choose the funds you want to invest in
 - viii. Continue
 - ix. Review & submit the form
3. Print the rollover form and submit this to Vanguard along with your rollover check. The mailing address will be on the rollover form.

If you have any questions, Vanguard participant services is available to assist with the rollover process 800-523-1188 between 8:30am and 9:00pm.