

Did you know you can roll over retirement accounts with other financial institutions to UMPIP? You sure can!

Why move your money?

<i>Convenient account consolidation</i>	Your money is all in one place making it easier to manage
<i>Potential savings</i>	Compare the cost of investing through UMPIP with your prior plan or IRA—you might save money
<i>Sustainable investment options</i>	Your investments are ethically managed in alignment with the <i>Social Principles</i> of The United Methodist Church

It's easy to get started—just reply to this e-mail or give me a call and I'll tell you how!

If you prefer to take a few simple steps on your own, here's what to do:

1. Determine if your other account is eligible for rollover. The following types of accounts are eligible:

401(a)/401(k) plan	Traditional IRA
403(b) plan	SEP IRA
Governmental 457(b) plan	SIMPLE IRA

2. Contact your financial institution to request any paperwork that needs to be completed.
3. Wespath will not assess a fee if you roll over, but be sure to ask if you will incur any fees from your financial institution for the transaction.
4. Complete the [Incoming Rollover](#) form.
5. Mail your original, signed *Incoming Rollover* form, any required paperwork from your financial institution along with a copy of a recent statement associated with the account(s) you plan to roll over to:

Wespath Benefits and Investments
Attention: Elera Smith-Andoh
1901 Chestnut Avenue
Glenview, IL 60025-1604

I'll take care of it from there!

You will receive a confirmation letter when the rollover is posted to your UMPIP account. The rollover will be invested based on your future contribution investment elections on record at Wespath.

Please feel free to call me at **1-800-870-4442, ext. 4278**. I would be happy to assist you in every way I can.

Cordially,

Elera C. Smith-Andoh

Rollover Concierge, Retirement Services

Wespath Benefits and Investments

1-800-870-4442 ext. 4278

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