

## Rollover Assistance Request



☐ **YES! I want to roll over funds from a prior retirement account to simplify my retirement planning.  
Please contact me to help with processing my rollover.**

**Employee Name** (Last, First, Middle) \_\_\_\_\_

**Email** \_\_\_\_\_

**Home/Cell Phone** \_\_\_\_\_

**Work Phone** \_\_\_\_\_

**I prefer to be contacted by:**    ☐ Email    ☐ Home/cell phone    ☐ Work phone

**Estimated rollover amount \$** \_\_\_\_\_

**Prior record keeper name** \_\_\_\_\_

**Plan #** \_\_\_\_\_

**Plan name** \_\_\_\_\_

**Please email this completed form to [rollover@adp.com](mailto:rollover@adp.com)**

Your contact information will only be used to assist with your rollover.

