

DISTRIBUTION REQUEST (Distribution of Traditional 401(k) to Roth IRA)

Is this document for me?


You should follow these instructions when:

Requesting a rollover of your Traditional 401(k) to a Roth IRA

Si necesita ayuda en español, comuníquese con el servicio al cliente, al 800-401-8726.

Ready to get started?

Please refer to the Special Tax Notice Regarding Plan Payments for the tax consequences associated with rolling over to a Roth IRA.

 A Transamerica representative is available to answer any questions, determine your eligibility, and assist with your distribution conveniently over the phone. Please call us at 800-401-8726 to get started.