

City of Tampa

How to Roll Money Over to your 457(b) Deferred Compensation Retirement Plan



So you are a new/existing employee and you want to roll your money over to your retirement plan?

- Good news! You can roll the money over to your 457(b) Deferred Compensation retirement plan!
- If you have the Florida Retirement System (FRS), you might want to:
 - Think about if you are in the pension plan or the investment plan
 - Think about if you are vested
 - If you are in the pension plan and you are not vested, are you going to ever go back to a FRS agency?
- Reach out to the company who does the retirement plan by phone and explain to them what you are doing (rolling the retirement plan to a current provider)
- In our brochure or online there is an Incoming Rollover Form that we need filled out and signed by you
- We can facilitate most rollovers except from Roth after tax accounts
- Still have questions? Reach out to me below for help!

For more information, contact **Rodney Walton** at **813.340.7545** or rwalton@flcities.com at the Florida League of Cities.