

Participants in Our Retirement Plans

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



What could one less weekly trip to the coffee shop mean to your 457(b) Deferred Comp retirement savings?

- 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:
 - Determine if you are in the pension plan or the investment plan.
 - Determine if you are vested.
 - If you are in the pension plan and you are not vested, consider if you would be returning to work for an agency in the state retirement system later in your career.
- Reach out to the company managing the retirement plan by phone and let them know you are planning to roll the retirement plan to a current provider.
- Complete and return the [Incoming Rollover Form](#) that be found on our website or in your enrollment packet.
- We can facilitate most rollovers, except from Roth after-tax accounts.
- Still have questions? Reach out to Rodney Walton via email or the number below for help!

For more information, contact **Rodney Walton** at **813.340.7545** or rwalton@flcities.com.