



## Deposit a Rollover check

You can easily deposit a rollover check from a former workplace savings plan, to your current plan, using the NetBenefits® Mobile App. There are two phases to this process: *Entering Your Rollover Details* and *Capturing Your Check*.

### Part 1: Entering Your Rollover Details

To begin, you need to capture the details of your rollover, including where the money is held today and the amount of your rollover.

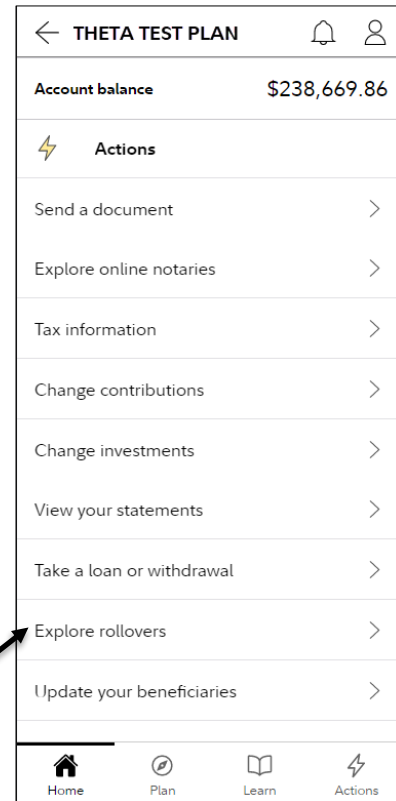
1. Log into the NB Smartphone app on your mobile device (available for Android and iOS).

The screenshot shows the Fidelity NetBenefits mobile app login interface. At the top, it says "Fidelity NetBenefits®". Below that is "Welcome". There are two tabs: "U.S. Employees" (which is selected) and "Outside U.S. Employees". Below the tabs are two input fields: "Username" and "Password". There is a "Remember Me" checkbox and a "Forgot login?" link. A green "Log In" button is at the bottom. At the very bottom, there are links for "Register as a new user" and "FAQs".

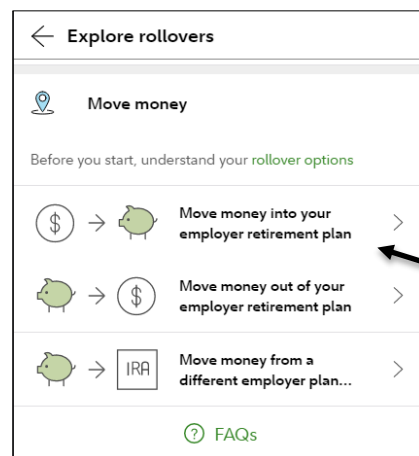
2. Select the account you'd like to roll money into.

The screenshot shows the account selection screen in the Fidelity NetBenefits mobile app. At the top, it says "THETA ORGANIZATION" with a bell icon and a person icon. Below that, it shows "Portfolio total" as "\$238,669.86" with a refresh icon. Underneath is a section for "Retirement savings" with a piggy bank icon and a link to "View all retirement investments". At the bottom, there is a list item for "THETA TEST PLAN" with a value of "\$238,669.86" and a right-pointing chevron. Below the plan name is "401(K)". A black arrow points to the "THETA TEST PLAN" text.

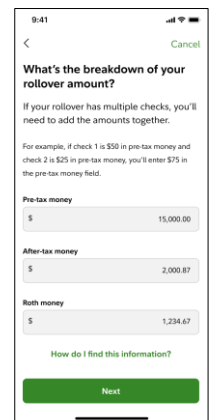
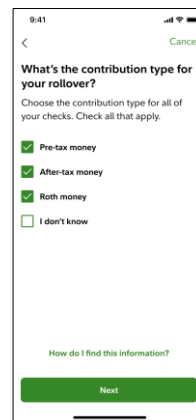
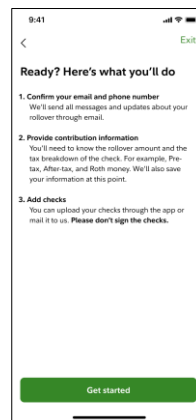
- On the DC summary page for the plan, scroll down to the Actions menu and tap on "Explore rollovers".



- From the "Explore rollovers page", select the option "Move money into your employer retirement plan".

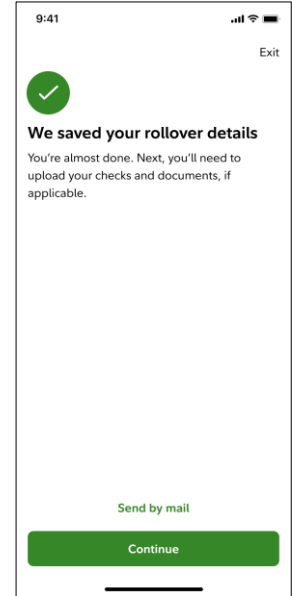
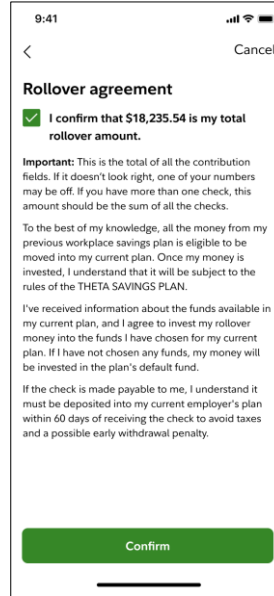


- You will need to provide answers to few questions related to your rollover like – type of contribution, rollover amount and the tax breakdown of the check.



6. After confirming the rollover amount, you will continue in the app to upload your checks and any supporting documents.

*Note: You also have the option to send your documents by mail*

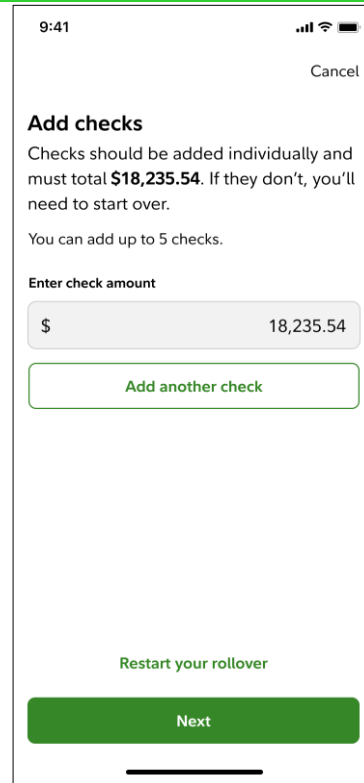


## Part 2: Capturing Your Check

You can continue to use the NetBenefits app to submit your rollover check(s) and any supporting documents as indicated by your plan rules.

1. You'll enter the amount of your check(s), hit "Next", and use your device's camera to take photos of the front and back of the check.

*Note: You may be asked to take photos of additional required paperwork.*

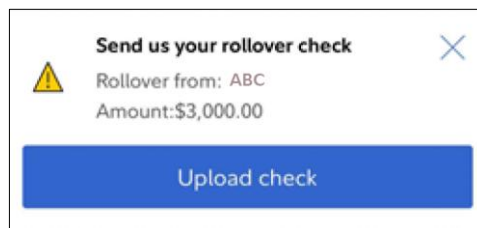


The screenshot shows the 'Add checks' screen in the NetBenefits app. At the top, the time is 9:41 and there are icons for signal strength, Wi-Fi, and battery. A 'Cancel' link is in the top right. The main heading is 'Add checks'. Below it, a message states: 'Checks should be added individually and must total \$18,235.54. If they don't, you'll need to start over.' Another message says: 'You can add up to 5 checks.' There is a section titled 'Enter check amount' with a text input field containing '\$ 18,235.54'. Below the input field is a green button labeled 'Add another check'. At the bottom of the screen, there is a green button labeled 'Next' and a link labeled 'Restart your rollover'.

2. Alternatively, if you had started your rollover on NetBenefits website and saved your rollover information, you can use the NetBenefits app to submit your checks.

You will see a message "Send us your rollover check" on the app's Home screen.

Tap "Upload check" to deposit your check.

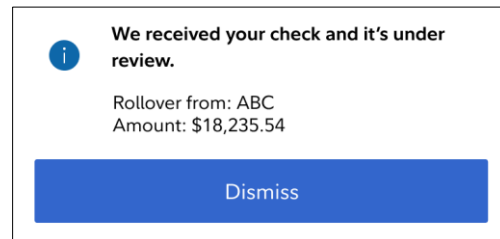
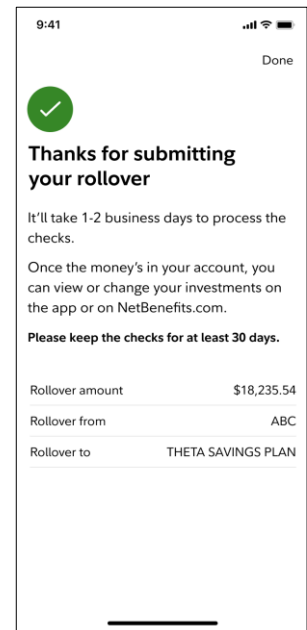
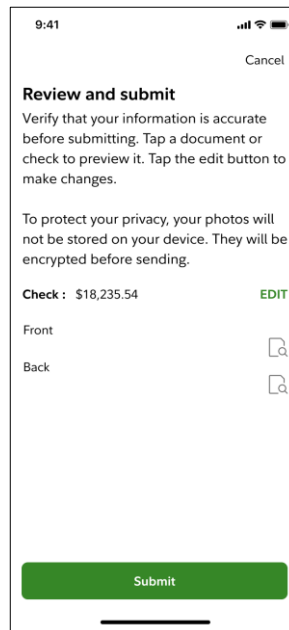


The screenshot shows a message box titled 'Send us your rollover check' with a close button (X) in the top right. On the left is a yellow warning triangle icon. The message text reads: 'Rollover from: ABC' and 'Amount: \$3,000.00'. At the bottom of the message box is a blue button labeled 'Upload check'.

3. Next, tap on "Submit" to deposit the check(s).

Once submitted, you will see a message on the app's Home screen that the check is received and under review.

*Note - You can come back to the app anytime after submitting the check to see whether your rollover is completed or needs attention.*



*All screenshots are for illustrative purposes.*

*\*Please note that availability of this feature may vary based on your plan rules.*

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Fidelity Brokerage Services LLC, Member NYSE, [SIPC](#), 900 Salem Street, Smithfield, RI 02917  
870402.2.0