

**Requirements to Move MCPS 403(b) or 457(b) Assets from Other Vendor to Fidelity**

<b>Other Vendor</b>	<b>Other Vendor Form Needed?</b>	<b>Plan Administrator Signature Needed on Vendor Form?</b>	<b>Fidelity Transfer/ Rollover/ Exchange Form (plan administrator signature NOT required)</b>	<b>Additional Requirement(s)</b>	<b>How to Submit Completed Forms</b>
Hendershot/ Lincoln Investment	No	N/A	Yes	Medallion signature guarantee for participant signature required by Hendershot/Lincoln Investment on Fidelity form.	Mail original Fidelity form with medallion signature guarantee and a copy of your most recent Hendershot/Lincoln Investment statement to Fidelity for processing.
MetLife	Yes	Yes	Yes	May require medallion signature guarantee; contact MetLife for more detail.	Submit the MetLife forms to the Division of Investments for signature. Submit the Fidelity forms to Fidelity.
VALIC	Yes	<b>NO</b>	Yes	May require medallion signature guarantee; contact VALIC for more detail.	Mail both the VALIC and the Fidelity forms to Fidelity for processing.
Voya	Yes	<b>NO</b>	Yes	Must ask for the <b>Voya Exchange Withdrawal Request.</b>	Mail both the Voya and the Fidelity forms to Fidelity for processing.
TIAA	Yes	<b>NO</b>	Yes		Mail both the TIAA and the Fidelity forms to Fidelity for processing.
Lincoln Financial Group (LFG)	Yes	Yes	Yes		Submit the LFG forms to the Division of Investments for signature. Submit the Fidelity form to Fidelity for processing.

\*When sending vendor forms to the Division of Investments for signature please:

- 1) ensure that you have completed all the relevant sections of the form including your signature and date and;
- 2) include a copy of your most recent statement from the existing vendor.

You can pony, fax (301-279-3177), scan and e-mail (DCPlans@mcpsmd.org) or mail forms to: MCPS, Division of Investments, 850 Hungerford Drive, Room 147A, Rockville, MD 20850. Forms cannot be brought to the Division of Investments in-person. Please allow 3 to 5 business days for processing.

*Information was provided by Montgomery County Public Schools. Fidelity Investments is not responsible for the content.  
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