

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

Previous Vendor	Previous Vendor Form Needed?	Plan Administrator Signature Needed on Vendor Form?	Fidelity Transfer/Rollover/Exchange Form required?	Additional Requirement(s)	How to Submit Completed Forms
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/Brighthouse	Yes	Yes	Yes	May require medallion signature guarantee; contact MetLife/Brighthouse for more detail.	Submit completed MetLife/Brighthouse and Fidelity forms to the Division of Investments.
AIG/VALIC/Corebridge	Yes	Yes	Yes	May require medallion signature guarantee on AIG/VALIC form; contact AIG/VALIC for more detail.	Submit completed AIG/VALIC and Fidelity forms to the Division of Investments.
Voya	Yes	Yes	Yes	Contact Voya to request a "Contract Exchange form to the plans other vendor Fidelity"	Submit completed Voya and Fidelity forms to the Division of Investments.
TIAA	N/A	N/A	Yes	Contact TIAA via phone to the request transaction.	Mail completed Fidelity form to Fidelity for processing.
Lincoln Financial Group (LFG)	Yes	Yes	Yes		Submit completed LFG and Fidelity forms to the Division of Investments.

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

- ensure that you have completed all the relevant sections of the form including your signature and date and;
- include a copy of your most recent statement from the existing vendor.
- Visit <https://www.netbenefits.com/mcps> and click on Tools & Resources to obtain the **Fidelity Transfer/Rollover/Exchange Form**.
- Contact information for previous vendors is on www.NetBenefits.com/mcps under "Contact Us" tab.
- You can pony, fax (301-279-3177), scan and e-mail (DCPlans@mcpsmd.org), or mail forms to: MCPS, Division of Investments, 15 W. Gude Drive, Suite 200, Rockville, MD 20850. Forms cannot be brought to the Division of Investments in-person.