BULL RUN INVESTMENT MANAGEMENT
BRIM

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How to Rollover Your Old 401(k) to Schwab

If you are rolling over a former employer's 401(k) plan into your Schwab account, please follow these steps:

1 Call Your Old 401(k) Provider

Contact your former plan administrator (examples: Fidelity, Ameriprise, Voya, Empower, Principal, etc.). Tell them you want to initiate a **direct rollover** into your Charles Schwab account.

2 Request the Check Be Made Payable to Schwab

Instruct your old provider to issue the rollover check **payable to:**

Charles Schwab & Co FBO: [Your Full Name AND 8-digit Schwab account number]

Example: Pay to the order of "Charles Schwab & Co FBO John Doe Act #1234-5678".

This ensures Schwab can deposit the funds directly into your account.

3 Mail the Check to Schwab

Ask the provider to mail the check directly to Schwab at the following address:

Regular Mail:
Charles Schwab & Co., INC
P.O. Box 982603
El Paso, Texas 79998

4 Confirm with Your Advisor

Once the rollover check is issued, please let us know so we can monitor the transfer and confirm the deposit into your account.

Questions?

If you need help with the rollover process or would like us to be on the line with you when you call your old 401(k) provider, don't hesitate to reach out.

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