Changed Jobs & Left Your Retirement Plan Behind?
We Can Help.

It happens all the time: you leave a job and leave your money in your prior employer's retirement plan. If you have money sitting in a retirement plan with a previous employer, there are four options you need to consider carefully.

1 **Leave It.** Leave your balance in your former plan

2 **Move It.** Transfer your balance to your new plan

3 **Take It.** Cash out of the plan

4 **Roll It Over.** Roll over to an IRA

What Should You Do?

The answer will depend upon your specific situation. You should evaluate the options and services provided, as well as the fees and costs associated with the various alternatives.

Rollovers

Rollover Options

Start Right Website

If you would like to begin the rollover process now, you can download the Rollover form from the Start Right website (www.startright.bokf.com) under Planning Forms, then contact your former employer for any forms and instructions they might require.

For assistance contact Participant Services Group at **1.800.876.9557.**

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