

To better serve you, below please find the process of rolling over Qualified Funds to your Vantage Retirement Plans IRA.

 **Request A Direct Rollover Distribution From Your Resigning Custodian/Plan Sponsor**

- Rollover requests are initiated and submitted by you to the Resigning Custodian.
- Funds can be sent via check made payable to:

**Vantage FBO YOUR NAME (Traditional, Roth, SEP) IRA # \_\_\_\_\_**

*\*Please contact our office for instructions if you would like the funds wired to your account*

- A direct rollover from a Qualified Plan takes approximately 7-21 business days. The actual time may vary depending on the speed with which your Qualified Plan Administrator responds to your request.

 **Complete A Vantage Rollover Certification Form**

- This form can be found on our website at [VantageIRAs.com](http://VantageIRAs.com)
- The original is not required. A copy can be submitted:

**By Email:**

[Administration@VantageIRAs.com](mailto:Administration@VantageIRAs.com)

**By Mail:**

Vantage Retirement Plans, LLC  
20860 N. Tatum Blvd., Ste 240  
Phoenix, AZ 85050

**By Fax:**

(480) 306-8408

 **Funds Received**

- You will receive an email from our office once the funds arrive.
- Checks are held for a mandatory 5 business days
- Wires and Cashier's checks are held for 1 business day

 **Important Notes**

- For your funds to remain "Qualified", you have 60 days to re-deposit them into an appropriate qualified account.
- Regulations prohibit rolling over funds more than one time every 12 months.
- Your Resigning Custodian will issue a 1099R for the Distribution. When the funds are received within the allowable timeframe, Vantage will issue a 5498 to the IRS.