

Move Funds to Vanguard

To move your funds from Fidelity or TIAA to Vanguard, follow these steps:

1. Complete [Vanguard's Asset Transfer Authorization Form](#) for EU employees and [Vanguard's Asset Transfer Authorization Form](#) for EHC employee. If you have any questions about this form, please contact Vanguard Participant Services at 1-800-523-1188.
2. Return the completed form to Vanguard: Vanguard, P.O. Box 982902, El Paso, TX 79998-2902
3. Vanguard will then forward the asset transfer request form with a letter of acceptance to the vendor (i.e. TIAA or Fidelity) listed on the request forms.
4. The other vendor will process the transfer request and send the funds to the participant's Vanguard 403(b) account.
5. A letter will be sent to the participant confirming the receipt of the asset transfer.

How an asset transfer is processed:

These are the general steps for the processing of an asset transfer. Please also note the following:

- The receiving institution (vendor) initiates the transfer (exception: TIAA basic money - The participant needs to contact TIAA to obtain the asset transfer forms and return the forms back to Vanguard).
- Contract exchanges and asset transfers differ from rollovers because a 1099-R tax form is not generated.
- Contract exchanges and asset transfers take 3 to 6 weeks to complete due to mailing times.
- A plan signature for approval is not required.