

CardinalKeystoneLine Benefits Review · Rollover Preparation Worksheet

Use this worksheet to prepare for consolidating prior-employer retirement plans.

Checklist

- 1. Inventory every pre-existing retirement account and note custodians.
- 2. Contact each custodian to confirm rollover requirements.
- 3. Select the receiving account and confirm transfer instructions.
- 4. Schedule a review session with our team at <https://calendly.com/bpettee/benefits-meeting>.

Account Details

Account Type	Current Custodian	Balance	Intended Action	Notes

Documents to Gather

- 1. Latest statement for each account.
- 2. Distribution or rollover forms from the current custodian.
- 3. Receiving account number and wire instructions.
- 4. Proof of employment or identity if requested.