How to: Rollover your Retirement Plan

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Rollover your Retirement Plan

Did you recently retire? Do you no longer work for the employer associated with your retirement account? We are here to help you move those funds over to your investment accounts so they can continue to to be invested all in one place!

Step 1

We recommend that you schedule a meeting with your advisor to discuss this life change. They will be able to review your plan and advise on where to appropriately transfer your funds.

Step 2

Once you have met with your advisor, they will reach out to our back office to provide instructions on where we will be transferring these funds to. In the meantime, you will need to reach out to the retirement plan company listed on your account statement and request the following:

1. Liquidate your account.

2. Mail a check to you for the proceeds or sometimes the institution can mail the check directly to the new institution. Should they be able to do so, please make sure that your account number is notated on the check to ensure that the new institution is able to locate your account quickly. In the next section, we have provided the mailing addresses to our most commonly used custodians/carriers. If you do not see the institution you need below, please reach out to us at clientsuccess@financialgravity.com and we will provide this to you.

Mailing Addresses

Mail To	Address	City, State, Zip Code
Charles Schwab & Co.	1945 Northwestern Drive	El Paso, TX 79912
Fidelity & Guaranty Life	777 Research Drive	Lincoln, NE 68521
Athene	7700 Mills Civic Parkway	West Des Moines, IA 50266
American Equity	6000 Westown Parkway	West Des Moines, IA 50266
Community National Bank	225 Main St	Seneca, KS 66538
North American Life Insurance Company	8300 Mills Civic Parkway	West Des Moines, IA 50266
Allianz	5701 Golden Hills Drive	Minneapolis, MN 55416-1297

If you have any questions, please reach out to us at clientsuccess@financialgravity.com or by calling 800-588-3893, opt. 2.

Authored By: McKensey Taylor

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