BrightWesthaven Ridge Enrollment Studio Program · 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.