

You're Ready to Begin.

To get started, you can either call a T. Rowe Price rollover specialist at 1-800-953-7851, or visit us at rollover.troweprice.com.

This is your customized Rollover Worksheet, which outlines the steps you'll need to take. If you have questions at any time, just ask. We're ready to help.

Rollover Specialist: 1-800-953-7851

Other Helpful Online Resources:
rollover.troweprice.com

Investor Center Locator:
troweprice.com/investorcenters

1. Get Organized

You've elected to have your retirement assets moved directly to T. Rowe Price (direct rollover).

Information you will need to get started.

Personal information.

- Your date of birth, Social Security number, and home address
- Your beneficiary's name(s), date(s) of birth, and Social Security number(s)

Prior plan information (found on your statement or distribution paperwork).

- Your former employer's name
- Your former plan administrator's name (usually someone in your HR Department)
- Name and address of the financial institution holding your former retirement plan assets
- The approximate amount to roll over

TIP: We recommend putting a folder together and compiling all the information above with your worksheet.

Notes: _____

2. Open an IRA Account With T. Rowe Price to Start Your Rollover

You have several options when it comes to opening an IRA account at T. Rowe Price.

You may:

- Call our rollover specialists at 1-800-953-7851. They can guide you through the steps so you can open your account over the phone.
- Go to rollover.troweprice.com to open your account online.
- Visit one of our Investor Centers (for locations and hours of operation go to troweprice.com/investorcenters).

What you can expect when opening your account:

- Whether you open your account online or over the phone, it will take approximately 10–15 minutes.
- No matter which option you choose, you'll receive your account number once you're done, which you'll need to move on to Step 3.
- You should also expect to receive confirmation of opening your account within 3–5 business days.

Investment selection:

Since you indicated that you'd like T. Rowe Price to assist you with your investment decisions rather than select individual mutual funds to construct your own portfolio, you may want to consider one of our target date funds, which offer a distinctly diversified portfolio in a single investment.

Visit troweprice.com/targetdatefunds to learn about the T. Rowe Price Retirement Funds and the T. Rowe Price Target Retirement Funds.

The principal value of the Retirement Funds and Target Retirement Funds (collectively the "target date funds") is not guaranteed at any time, including at or after the target date, which is the approximate year an investor plans to retire (assumed to be age 65) and likely stop making new investments in the fund. If an investor plans to retire significantly earlier or later than age 65, the funds may not be an appropriate investment even if the investor is retiring on or near the target date. The target date funds' allocations among a broad range of underlying T. Rowe Price stock and bond funds will change over time. The Retirement Funds emphasize potential capital appreciation during the early phases of retirement asset accumulation, balance the need for appreciation with the need for income as retirement approaches, and focus on supporting an income stream over a long-term retirement withdrawal horizon. The Target Retirement Funds emphasize asset accumulation prior to retirement, balance the need for reduced market risk and income as retirement approaches, and focus on supporting an income stream over a moderate post-retirement withdrawal horizon. The target date funds are not designed for a lump sum redemption at the target date and do not guarantee a particular level of income. The key difference between the Retirement Funds and the Target Retirement Funds is the overall allocation to equity; although they each maintain significant allocations to equities both prior to and after the target date, the Retirement Funds maintain a higher equity allocation, which can result in greater volatility over shorter time horizons.

Notes: _____

Account#: _____

3. Contact Your Former Employer to Initiate a Distribution

Once you've opened your account with T. Rowe Price, you must contact your former employer to initiate the authorization to move your money.

Because each plan has a different set of guidelines for initiating a distribution, we suggest calling your former plan administrator to find out what steps you need to take to get started.

What to expect:

- Most likely, you'll need to complete some forms from your former plan provider to initiate the distribution.
- Request a distribution check mailed directly to T. Rowe Price.
- Your plan may require a letter of acceptance (a sign-off from T. Rowe Price). T. Rowe Price automatically generates letters of acceptance for all new accounts established—it can be found with your account confirmation. If it's required by your plan, you'll need to mail it to them.

TIP: T. Rowe Price will notify you when the funds have been deposited in your account.

If you have any issues or just want clarification on any steps relating to your rollover, please call a T. Rowe Price rollover specialist at 1-800-953-7851. We'll guide you through the steps you need to take and help you get your distribution started.

Rollover checks can be forwarded, along with your T. Rowe Price IRA account number, to the following address:

T. Rowe Price
P.O. Box 17150
Baltimore, MD 21297-1150

Visit troweprice.com/prospectus to download a prospectus, which includes investment objectives, risks, fees, expenses, and other information that you should read and consider carefully before investing.