

How to Open a Rollover IRA Account

Welcome to Dodge & Cox. We offer a variety of ways to invest for your retirement in our value-oriented, no-load, low-cost mutual funds, and it's easy to open a retirement account online. Our online rollover process is straightforward, and we make it easy for you by submitting your rollover paperwork to your current retirement plan provider. Plus, our specialists are here to help.

Let's say you've changed jobs and decided to take control of your retirement plan assets held with your former employer, like a 401k, and you want to complete a rollover into an Individual Retirement Account, also known as an IRA. To get started, click "Start an Application." Select "Individual Retirement Accounts" to see your IRA options. Use the dropdown menu to pick the right one for your needs. For help, compare the descriptions at the bottom of the page. Remember, you need to map the assets from your current retirement plan to the same type of IRA.

Open a traditional IRA for pre-tax savings or a Roth IRA for after-tax savings, or both if your retirement plan has both types of savings. If you're not sure or have questions about the process, you can always contact us. Then tell us how you're funding your new IRA account. The most common way is a direct rollover. From here, it's just five steps:

- Step one, provide essential information about yourself like your name, address, social security number, and date of birth. You can be confident Dodge & Cox uses a number of security measures to help keep your data safe.
- Step two, name your beneficiaries. These are the people who will receive your IRA assets in the event of your death.
- Step three, set up your investments by estimating your rollover amount and assigning a percentage to the Dodge & Cox Funds you want to invest in.
- Step four, provide rollover details including a contact name and the address of your former employer's retirement plan provider, along with your account number. You should be able to find this information on a recent account statement. Then create a username and password and review your information. Once you verify your account details and accept our terms of use, we'll confirm your new account request.
- The final step is to print a copy of the transfer request form and sign, date, and mail it to us. We'll reach out to the plan administrator and arrange for your rollover. It can take several weeks to complete the process.

To view your new account, just click "Login to my Account" and use the login information you created and that's it. You can log into your new account to view the Funds you selected. Once we've received your rollover, you'll see the account balance invested in the Funds you selected earlier.

Investment Focus with Dodge & Cox