



## Transfer Guide

**Transferring assets to Midwest Capital Advisors is quick and easy. Here are answers to some FAQs to help you begin the process:**

### [What are the advantages of transferring 403\(b\) assets to MCA?](#)

There are many advantages. To begin with, your transferred funds will enjoy the same benefits of professional investment management by an independent registered investment advisor as your current MCA 403(b) account does. This includes the full array of diversified, low-cost investment options that are available for your current MCA 403(b) portfolio. You will have the ease, convenience and peace of mind of a single 403(b) statement and provider, making it easier to manage your retirement accounts and obtain information that helps you make good investment decisions.

### [Does MCA charge any fees for transferring my assets?](#)

No, MCA charges no transfer fees. Some providers do, however, and before we proceed with any transfer we will evaluate the extent of any fees and work with you to set a plan of action on how to reduce or eliminate them and best proceed with the transfer.

### [What do I have to do in order to start the transfer process?](#)

Simply fax, email, or mail us a copy of your most recent 403(b) statement. We will evaluate what options are available to you and confirm whether or not there would be any surrender fees charged by the previous company. We will then contact you to discuss final details before any paperwork is processed.

**Fax:** 616-454-9608, Attn: 403(b) Transfer

**Email:** [info@midwestcap.com](mailto:info@midwestcap.com), Subject: 403(b) Transfer

**Mail:** Midwest Capital Advisors  
Attn: 403(b) Transfer  
3001 Orchard Vista Dr. SE  
Grand Rapids, MI 49546

### [What do I have to do if I decide to transfer assets?](#)

Once we have confirmed with you what type of transfer is desired, we will mail you signature-ready documents. All you need to do is provide the appropriate signatures, and then mail the documents back to us in the envelope provided. That's all you need to do. From there all processing will be completed by MCA on your behalf.

### [Can I transfer non-403\(b\) assets \(or even non-retirement assets\) to MCA?](#)

Yes. Midwest Capital Advisors offers professional management for all of the common retirement (including IRAs and Roth IRAs) and non-retirement investment accounts that you (or perhaps a friend or member of your family) might have or want to establish. We would be pleased to discuss these offerings with you. Just give us a call.