


Record a transfer of funds

Over time, your investing goals and needs may change. Your plan may make additional investment options available to you as well. You may decide to transfer funds between the securities you're currently investing in, or [add an entirely new security](#) to your 401(k) holdings.

1. Open your 401(k) account.
2. Click  (the Account Actions icon), and then choose Update 401(k) Holdings.
3. Click Update 401(k) Holdings. [Proceed through the update screens as usual](#) until you reach the first security affected by the transfer. When you enter the information for that security, enter the post-transfer information. In other words, for Ending shares and Ending balance, enter the amounts from after the transfer.

Be careful when transferring this information from your statement. The section describing the transfer may appear in a different location on the statement from the section describing your contributions.

Continue updating your 401(k), making sure that the information you record for each security affected by the transfer already takes that transfer into account.

4. On the Enter information for transfers screen, select the Yes option, then enter the number of times that you've transferred funds between securities under Number of Transfers. Click Next.
5. For each transfer, enter the amount transferred, the name of the security you transferred the funds from and the number of shares you sold, and the name of the security you transferred the funds to and the number of shares those funds bought.
6. Finish updating your 401(k) as usual.