# Summit Skyward-Gate Partners · 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 |
|---|---|---|---|---|
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## 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.

Prepared for Summit Skyward-Gate Partners clients on 2025-11-04T20:48:57.031Z · Contact hello@bwpfinancialpartners.com