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EMPLOYEE STATUS: ACTIVE

## Bizible Retirement Trust

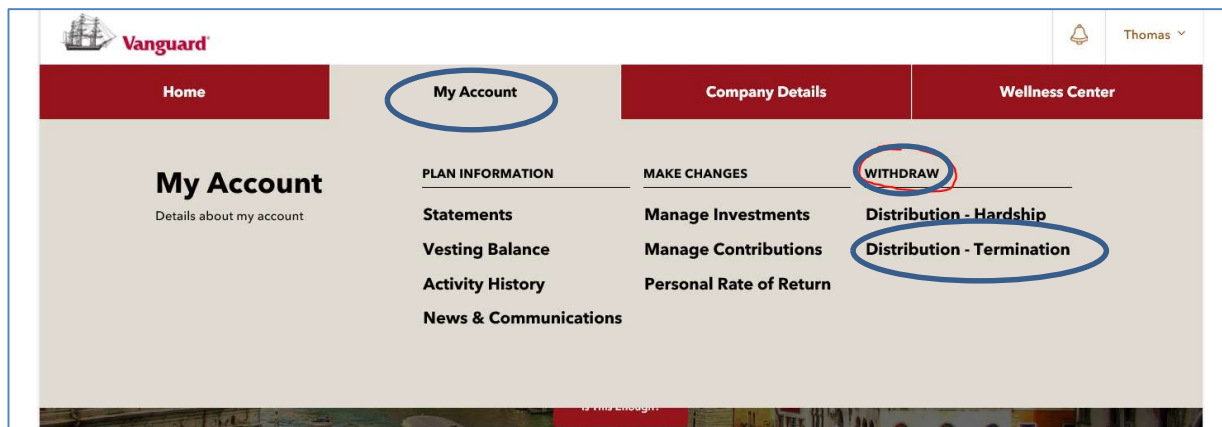
### Rollover to Adobe 401(k) Retirement Savings Plan

#### Step-by-Step Instructions

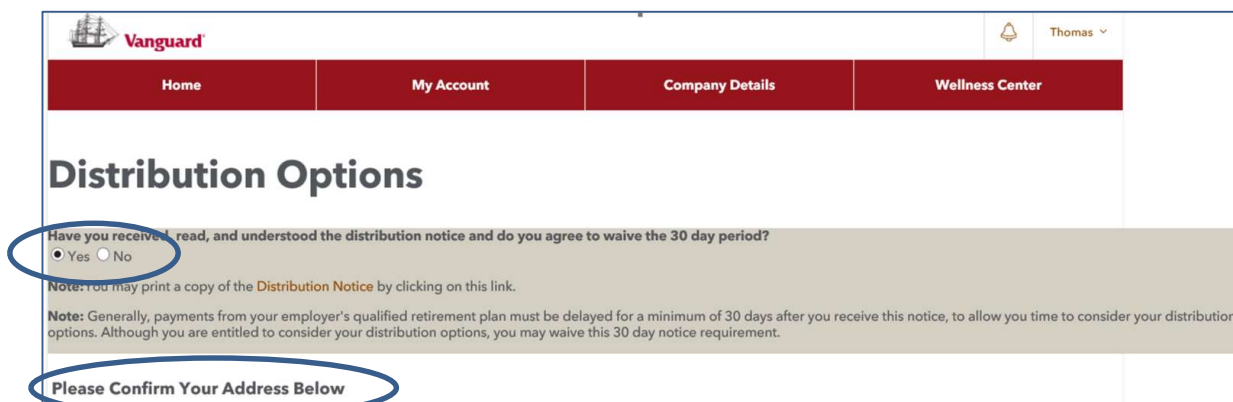
#### Steps 1 to 9 – Bizible Retirement Trust

Access your Bizible account online at [my.vanguardplan.com](http://my.vanguardplan.com) or call (866) 794-2145 and request a rollover of your account to the Adobe 401(k) Plan by following these steps:

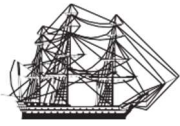
1. Go to [my.vanguardplan.com](http://my.vanguardplan.com).
2. Select 'My Account'.
3. Under Withdraw, select 'Distribution – Termination'.



4. Under Distributions Options, select 'Yes' and confirm your mailing address. Verify that your address is correct on your Bizible account.



5. After confirming your address, select 'Terminations' and 'Continue'.



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The screenshot shows the Vanguard website interface. At the top, there's a navigation bar with 'Home', 'My Account', 'Company Details', and 'Wellness Center'. Below this, the 'Distribution Options' section is displayed. It contains two radio button options: 'Hardship Distribution' and 'Terminations'. The 'Terminations' option is circled in blue. Below the options is a 'Continue' button.

**Distribution Options**

☐ **Hardship Distribution** - You are an active employee of the employer sponsoring your plan and have a financial need that requires taking a hardship distribution from your retirement account.

☐ **Terminations** - You no longer work for the employer who sponsors this plan and would like to request a distribution from your retirement account.

[Continue](#)

6. To rollover your entire Bizible account balance to the Adobe 401(k) Plan, select option 2 - '100% Rollover'. Your rollover check will be mailed directly to Vanguard. To split your distribution between cash\* and rollover to the Adobe 401(k) Plan, select option 3 - 'Split'. Your cash (check) will be mailed to your home address and your rollover check will be mailed directly to Vanguard. Note that *cash* distributions are subject to taxes and early withdrawal penalty.

The screenshot shows the Vanguard website interface. At the top, there's a navigation bar with 'Home', 'My Account', 'Company Details', and 'Wellness Center'. Below this, the 'Distribution Options' section is displayed. It contains a question 'What type of distribution are you taking?' followed by three radio button options: '100% Cash', '100% Rollover', and 'Split - I want to take part of this distribution in cash and roll over the rest to another account.' The '100% Rollover' option is circled in blue. Below the options is a 'Continue' button.

**Distribution Options**

What type of distribution are you taking?

1. ☐ 100% Cash

2. ☐ 100% Rollover

3. ☐ Split - I want to take part of this distribution in cash and roll over the rest to another account.

[Continue](#)

7. Select 'Qualified Retirement Plan'.

The screenshot shows the 'Rollover instructions' section. It contains a list of radio button options: 'Qualified Retirement Plan', 'IRA', '403(a) Plan', '403(b) Plan', and '457(b) Plan'. The 'Qualified Retirement Plan' option is circled in blue. Below the list is a 'Continue' button.

**Rollover instructions:**

☒ **Qualified Retirement Plan**

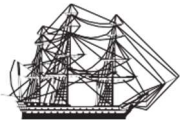
☐ IRA

☐ 403(a) Plan

☐ 403(b) Plan

☐ 457(b) Plan

[Continue](#)



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8. Request a rollover check made payable to Vanguard as follows:

**Rollover instructions:** Qualified Retirement Plan

If rolling over Roth money to another retirement plan, you must ensure the plan accepts Roth money.

**Please note:** You must enter a valid financial institution name. If not, receipt of your check will be delayed. Check(s) will be sent to the address listed above, not the Financial Institution/Trustee named below unless an account number is given.

**Trustee information:**

**Name of Financial Institution/Trustee**

Vanguard Fiduciary Trust Company (VFTC)

Do not enter "FBO [your name]". This is automatically printed on your check.

**Account Number**

096204

**Address 1**

Vanguard

**Address 2**

P.O. Box 982902

**City**

El Paso

**State, Zip**

TX

79998-2902

**Continue**

9. If you **have Roth after-tax contributions**, you will need your 'Roth Cost Basis' and 'Date of First Contribution'. Request the following information from the participant service representative (or access your account via my.vanguardplan.com):
- > What type of contributions are in your Bizible account (pre-tax and/or Roth after-tax) and the amount in each contribution source. If you **have made Roth after-tax contributions**, access a copy of your most recent statement or request a copy which should provide your Roth cost basis and the date of the first contribution you made to a Roth contribution source.



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### **Steps 10 and 11 – Adobe 401(k) Plan**

10. Complete the Adobe online rollover form by logging on to your Adobe 401(k) Plan account at [vanguard.com/retirementplans](http://vanguard.com/retirementplans). Click **Manage My Money** then **Roll over money into this plan**.

Enter the following information:

- > Type of rollover (**Qualified Plan**).
- > How the money is being sent (**check**).
- > Rollover amounts by source (**pre-tax** and/or **Roth after-tax**).
- > How you want to invest your rollover.

Upon completion of the online form, click **Submit**, print, and save a copy.

11. If you **have Roth after-tax contributions**, mail a copy of your most recent Bizible account statement, along with a copy of your online rollover form to Vanguard: P.O. Box 982902, El Paso, TX 79998-2902.

### **Bizible 401(k) Plan Questions?**

Call a Vanguard (Ascensus Dept) Participant Services associate at 866-794-2145 Monday – Friday 5:00am – 5:00pm PT.

Access your account at [my.vanguardplan.com](http://my.vanguardplan.com).

### **Adobe 401(k) Plan Questions?**

Call a Vanguard Participant Services associate at 800-523-1188 Monday – Friday 5:30am – 6:00pm PT.

Access your account at [vanguard.com/retirementplans](http://vanguard.com/retirementplans).

### **Employee Experience related question?**

Contact the Adobe Employee Resource Center (ERC) at 408-536-4357 or [erc@adobe.com](mailto:erc@adobe.com).

**\*Tax implications:** You will be responsible for paying any federal, state, local or foreign taxes on a distribution or withdrawal from pre-tax accounts. Early withdrawals may be subject to a 10% additional tax. To the extent required by law, Vanguard will make the appropriate withholding for tax purposes.