R·F·S Rubins Financial Strategies
Insurance & Employee Benefits
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IRA/Retirement Plan Rules for Transfers and Rollovers

- 457 plans for city and state employees can be transferred or rolled over tax deferred to other retirement accounts including IRAs.
- 401(k), 403(b) and profit sharing plans can accept transfers from other retirement plans i.e., (IRA, 457, 403(b), SEP).
- Roth-IRA cannot transfer to Roth 401(k).
- Simple-IRAs can only accept transfers from other simple-IRAs.

A general overview – check with your tax adviser before taking action

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