

Your 401(k) to Gold IRA Rollover Roadmap Checklist

- Step 1: Check Account Eligibility.** (Verify if the current 401(k) allows an in-service distribution or if it's a standard post-employment rollover).
- Step 2: Choose a Self-Directed IRA (SDIRA) Custodian.** (Ensure they allow physical precious metals).
- Step 3: Initiate a "Direct Rollover."** (Highlight the 60-day rule warning to avoid unintended tax penalties).
- Step 4: Select an IRS-Approved Depository.** (Choose between Delaware Depository, Brink's, etc., and pick Segregated vs. Non-Segregated storage).
- Step 5: Fund and Execute the Trade.** (Direct the custodian to wire funds to the dealer to lock in metal pricing).