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**Montgomery County Public Schools Employees Defined Contribution Plans – Directions for completing an In-Service Exchange (active employees moving from one approved vendor to another) to/from Fidelity Investments.**

**MCPS 403(b) Fidelity Plan Number: 50300  
MCPS 457(b) Fidelity Plan Number: 62512**

**In-Service Exchange of Assets to Fidelity (you are moving your account balance to Fidelity)**

Employee must complete the [Fidelity Transfer/Rollover/Exchange Form](#) (used for either Plan) – original must be returned to Fidelity along with [MCPS In-Service Exchange Certificate from Retirement Manager](#)

Fidelity then sends a letter of acceptance to the former vendor you are moving the account from.

**In-Service Exchange of Assets from Fidelity (you are moving your account balance to another vendor)**

Fidelity does not require any of its own paperwork to process the exchange of assets from your existing account to another vendor. Fidelity will act on the request once it receives a Letter of Acceptance from the new vendor and a valid [MCPS In-Service Exchange Certificate from Retirement Manager](#)

Questions regarding Fidelity transactions should be directed to the call center, 800-343-0860