

## Companies that captured the highest market share of participants rolling over assets from DC plan to IRA

<b>Company</b>	<b>Market share</b>
Fidelity Investment	9%
Vanguard	9%
Edward Jones	7%
Charles Schwab	5%
Ameriprise Financial	5%
Merrill Lynch	5%
Bank of America	4%
Wells Fargo/Wachovia	3%
LPL Financial	3%
Scottrade	3%
Ameritrade/TD Ameritrade	3%
UBS Financial Services	2%
JP Morgan	2%
USAA	2%
Morgan Stanley Smith Barney	2%
Total, top 15 rollover companies	64%

Note: Based on 642 participants who rolled their DC plan balance to a company other than the plan provider.

Source: *Money in Motion: Understanding the Dynamics of Rollovers, Roll-ins, and IRA Transfers*, LIMRA Secure Retirement Institute (2017)

