



# Online Distribution

Visit <https://retirementplanconsultants.info/login/>

Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.

Select role from dropdown menu: **Participant**

Click the **Login** button

A One-Time PIN (OTP) is required to login using multi-factor authentication (MFA). If you need additional guidance with the OTP process, click the **Guide to Logging in with MFA** link (located at the top of this gray login box).

On the Participant Dashboard, click the **Manage Your Account** tab.

Select **Withdrawal Options** off the dropdown menu.

When the **Withdrawal Options** screen is displayed click the **Select a termination type** dropdown arrow and choose the payment method that reflects how you want to receive your termination distribution.

*Please keep in mind that Cash Withdrawals are taxable and will be paid out to you less any federal and/or state tax withholdings. Rollover Requests are non-taxable rollovers to an IRA or qualified retirement plan.*

Select the **GET STARTED** link.



# Online Distribution

Read the Instructions and click the **View the Special Tax notice** link. Once the Special Tax Notice has been reviewed, click the **Next** button.

Termination Distribution Request - Termination Rollover Request

Overall Progress: **0% Complete**

Instructions

**PLEASE NOTE: Only full termination withdrawals (rollover or cash payments) are available online. If you are looking to take a combination payout, partial distribution, or any other in-service distribution you will need to fill out a distribution request form located in the Forms, Guides, & Documents tab at the top of the screen.**

The following pages will take you through the steps to request a distribution from the plan. Use the buttons at the bottom of the page to navigate to the next step. Click here for a guide to help complete the required steps. After you have completed all of the steps, you will be shown a summary of your request to review before submitting the request for approval.

View the Special Tax Notice below to understand the tax consequences of taking this distribution, for any questions consult with your tax advisor prior to completing this request.

Important Tax Information

Please take the time to read the plan tax notice. It contains important information about the taxability of retirement plan distributions, including methods to defer federal income tax on your savings by making a rollover election.

[View the Special Tax notice](#)

Account Balance Summary

Source	Balance	Vested Percent	Vested Balance
Employee Traditional Deferral	\$1,171.68	100.00%	\$1,171.68
Employer Match	\$46.86	100.00%	\$46.86
Employer Safe Harbor Non-Elective	\$209.58	100.00%	\$209.58
Roth Deferral	\$398.69	100.00%	\$398.69

CANCEL **NEXT**

Overall Progress: **16% Complete**

Instructions

Please verify the following personal information is correct. If incorrect information is provided, this may delay or prevent the delivery of your payment. If the information is incorrect, update the information under 'Manage Your Account', 'Edit Your Personal Information' tab at the top of this page.

General Information

First name: Bear, Last name: Polar

Marital status: Single, Birth date: 02/22/1959, Date of hire: 02/18/2019

Street address 1: 124 Test Dr., Street address 2:

City: Norfolk, State: NE, Zip code: 68701, Country:

Home phone: +1 123 - 286 - 7890, Receives text messages:  Yes  No

Office phone: +1 123 - 456 - 7890 - Ext, Receives text messages:  Yes  No

Other phone: +1 --, Receives text messages:  Yes  No

> Email Confirmation Information

CANCEL BACK **NEXT**

Review and verify your General Information. If updates are needed, go to the **Manage Your Account** tab at the top of this screen and choose **Edit Your Personal Information** option off the dropdown menu.

Once the information is updated, return to the Withdrawal Options page and select **Continue** to proceed with your request. Once everything looks correct, click the **Next** button.

Review the payment type(s) and the payment method(s) and click the **Next**

Overall Progress: **32% Complete**

Instructions

Enter the desired options below for receiving a lump sum distribution from the plan.

Payments from Traditional (Pre-tax) Accounts

I elect to receive payment(s) less any applicable transaction fees from my traditional accounts in the following form:

A direct rollover of my vested balance to an IRA or a qualified retirement plan.

Payments from Roth Accounts

I elect to receive payment(s) less any applicable transaction fees from my Roth account in the following form:

A direct rollover of my vested balance to an IRA or a qualified retirement plan.

CANCEL BACK **NEXT**



# Online Distribution

## Termination Rollover Request

Review the payment type(s) and estimated amount(s) shown on the next screen. Click the **Select One** dropdown arrow(s) and choose Check for each payment shown.

Termination Distribution Request - Termination Rollover Request

Overall Progress: 48% Complete

Instructions  
Please provide information necessary to facilitate payment of your account balance. Select each payment type below in order to enter payment detail information. [View instructions](#) are not an acceptable form of payment. A check reissue fee will apply if necessary.

Payments from Traditional (Pre-tax) Accounts  
You have elected to receive 100% of your Traditional account as a rollover.

Payment Type	Amount	Estimated Distribution*	Payment Method
Rollover		100.00%	\$1,428.12
			Select One

Payments from Roth Accounts  
You have elected to receive 100% of your Roth account as a rollover.

Payment Type	Amount	Estimated Distribution*	Payment Method
Rollover (Roth)		100.00%	\$398.69
			Select One

CANCEL BACK NEXT

\*Estimated distributions are based on current balance and pricing, and are subject to change due to market fluctuation. This amount is not a guarantee of the amount you will receive if your distribution request is approved and does not take into account for fees and tax withholding.

Once you select **“Check”**, you will need to complete the below information for each source. Fields marked with an asterisk are required. Then, click the **Save** button.

Cash Payment Method

Payment method: Check

Bank name \*

FBO: Mo Jo

Street address 1 \*  
Street address 2

City \*  
State \*  
Zip code \*

Foreign state (outside US only)  
Country

Rollover to \*  
IRA

IRA account # \*

CANCEL SAVE

## Termination Cash Withdrawal

Review the payment type(s) and estimated amount(s) shown on the next screen. Click the **Select One** dropdown arrow(s) to choose your payment method(s) (ACH or Check) for each payment shown.

Termination Distribution Request - Termination Cash Withdrawal

Overall Progress: 48% Complete

Instructions  
Please provide information necessary to facilitate payment of your account balance. Select each payment type below in order to enter payment detail information. [View instructions](#) are not an acceptable form of payment. A check reissue fee will apply if necessary.

Payments from Traditional (Pre-tax) Accounts  
You have elected to receive 100% of your Traditional account as a lump sum cash payment.

Payment Type	Amount	Estimated Distribution*	Payment Method
Cash		100%	\$1,428.12
			Select One

Payments from Roth Accounts  
You have elected to receive 100% of your Roth account as a lump sum cash payment.

Payment Type	Amount	Estimated Distribution*	Payment Method
Cash (Roth)		100%	\$398.69
			Select One

CANCEL BACK NEXT

\*Estimated distributions are based on current balance and pricing, and are subject to change due to market fluctuation. This amount is not a guarantee of the amount you will receive if your distribution request is approved and does not take into account for fees and tax withholding.

If you select **“Check”**, you will need to complete the below information. Fields marked with an asterisk are required. Then, click the **Save** button.

Cash Payment Method

Payment method: Check

Payable to \*  
Mr. J.

Street address 1 \*  
1 Single Ave

Street address 2

City \*  
Johnson

State \*  
ME

Zip code \*  
12345

Foreign state (outside US only)  
Country

CANCEL SAVE

If you select **“ACH”** you will need to complete the below information, fields marked with an asterisk are required. Then, click the **Save** button.

Cash Payment Method

Payment method: ACH

Account holder name's \*

ABA routing number \*

Bank account # \*  
File-Enter account # \*

Sub-account #

Bank name \*

Street address 1 \*  
1 Single Ave

Street address 2

City \*  
Johnson

State \*  
ME

Zip code \*  
12345

Foreign state (outside US only)  
Country

CANCEL SAVE



# Online Distribution

Review and confirm the statements by checking each box to the left of each statement. Once you have reviewed and checked all the boxes you can click the **Next** button.

Overall Progress: **64% Complete**

**Instructions**

By checking the boxes below and continuing, you are agreeing to all of the statements on this page. If you do not agree, the request cannot be completed at this time.

Please review and confirm these statements.

- I have read the **Special Tax Notice** and I understand the tax consequences of taking this distribution. If I am requesting that a portion of my distribution be rolled over, I hereby certify that the IRA or Plan identified in the payment details is an "eligible retirement plan" authorized to accept the direct rollover of my Plan distribution. I understand that if I have Roth money in my account it will be coded as a Roth rollover and if I have Pre-tax money in my account it will be coded as a Pre-tax rollover regardless of the rollover account type selected.
- I consent to an immediate distribution of my vested account balance. I wish to waive any unexpired portion of the minimum 30-day notice period during which I may consent to a distribution from the Plan.
- I understand that any account balances valuations that were provided to me are subject to change upon further valuations. If I am less than 100% vested in my account, I understand the distribution will result in a forfeiture of the non-vested portion of my account balance.
- I certify under penalties of perjury that the social security number provided is correct and I am a US person (including a US resident alien). I request this distribution and certify that I am (or the indicated alternate payee is) the proper party to receive payments(s) from this Annuity Contract / Custodial Account and that the information provided is true and accurate.

**Transaction Certification**

- I have read the **Special Tax Notice** and I understand the tax consequences of taking this distribution. If I am requesting that a portion of my distribution be rolled over, I hereby certify that the IRA or Plan identified in the payment details is an "eligible retirement plan" authorized to accept the direct rollover of my Plan distribution. I understand that if I have Roth money in my account it will be coded as a Roth rollover and if I have Pre-tax money in my account it will be coded as a Pre-tax rollover regardless of the rollover account type selected.
- I consent to an immediate distribution of my vested account balance. I wish to waive any unexpired portion of the minimum 30-day notice period during which I may consent to a distribution from the Plan.
- I understand that any account balances valuations that were provided to me are subject to change upon further valuations. If I am less than 100% vested in my account, I understand the distribution will result in a forfeiture of the non-vested portion of my account balance.
- I certify under penalties of perjury that the social security number provided is correct and I am a US person (including a US resident alien). I request this distribution and certify that I am (or the indicated alternate payee is) the proper party to receive payments(s) from this Annuity Contract / Custodial Account and that the information provided is true and accurate.

Scroll through and confirm that all the details on the next screen are correct and click the **Submit** button to proceed. If changes are needed click the **Back** button or to discontinue with the distribution click the **Cancel** button.

The next screen that displays will be a confirmation that your Distribution has been requested and it will be moved on for approval and processing.

**Please Note:** The typical processing time is between 10-14 business days. To review the status of your request you can go to the **Manage Your Account** tab and then select **Web Requests** off the dropdown menu.