RETIREMENT
PLAN CONSULTANTS LLC

TERMINATION DISTRIBUTION PACKET

Hello.

Your company has partnered with

Retirement Plan Consultants (RPC)

to manage its retirement plan.

We are here to assist you with the distribution process.

As a result of your recent change in employment status, you have multiple distribution options available to you regarding your retirement account.

Distribution Options:

Cash distribution: You may withdraw your account as cash; you can receive a check or have it directly deposited into a bank account. A cash withdrawal is taxable income to you in the year distributed. Please review the special tax notice to understand any taxes and penalties that may apply.

Rollover: You may transfer funds from your retirement to your new employer's retirement plan or an Individual Retirement Account. There are no penalties or taxes for requesting a rollover distribution.

Combo Payment: You may choose a combination of the Cash and Rollover distribution options listed above. Rollover a portion of your funds and withdraw the remainder of your account as cash.

To request a distribution from your account, please see the following pages for a step-by-step guide to help you log into your retirement account and start the distribution process.

If you have any questions, please feel free to call 877-800-1114 to speak with the Retirement Plan Consultants Client Service Team.

Online Distribution

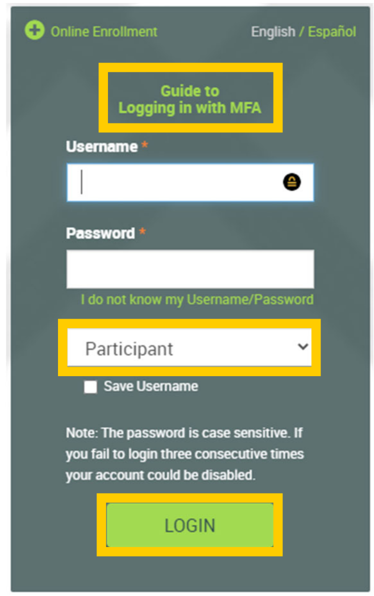
Visit https://retirementplanconsultants.info and click **Account Access** on the website header menu.

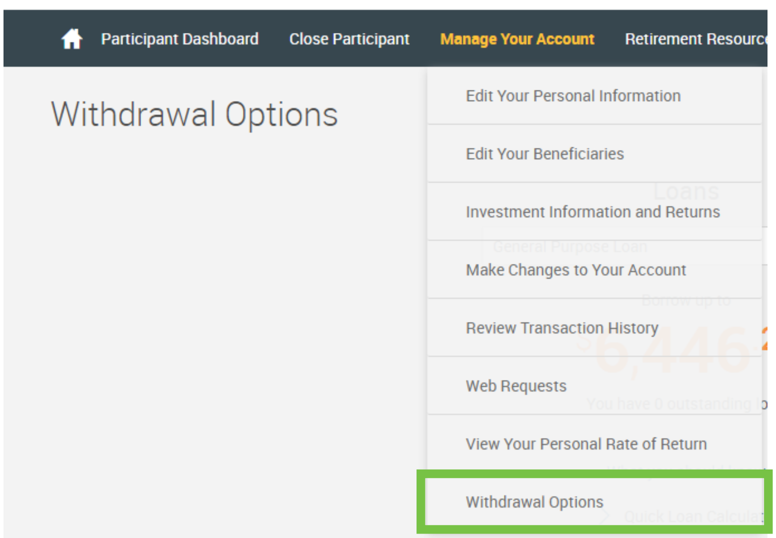
Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.

Select role from dropdown menu: **Participant**

Click the **Login** button

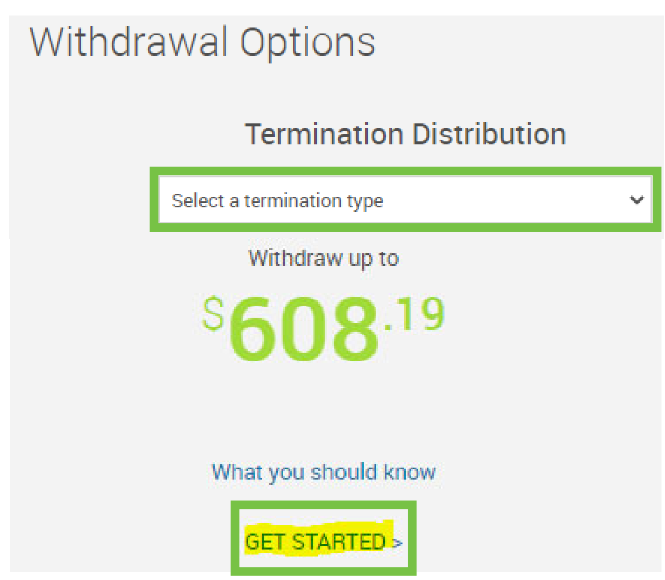
A One-Time PIN (OTP) is required to login using multi-factor authentication (MFA). If you need additional guidance with the OTP process, click the **Guide to Logging in with MFA** link (located at the top of this gray login box).





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

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

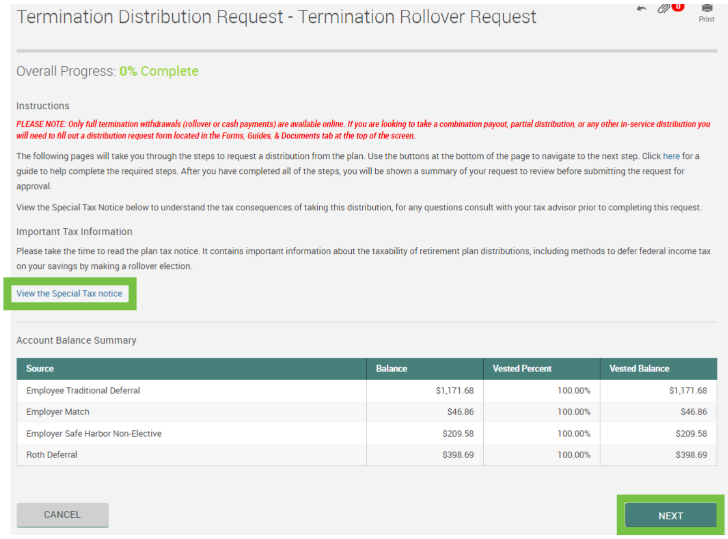


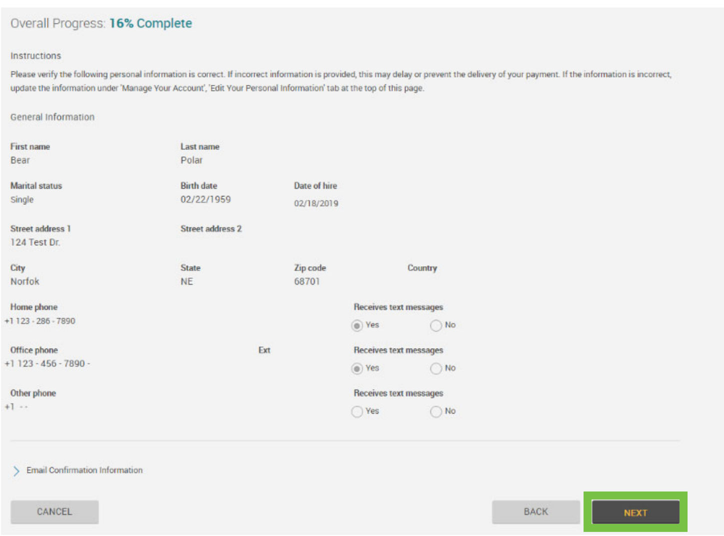
When the **Withdrawal Options** screen is displayed click the **Select a termination type** dropdown arrow and select the **Termination of Service** option from the list.

Click the **GET STARTED** link.

Online Distribution

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





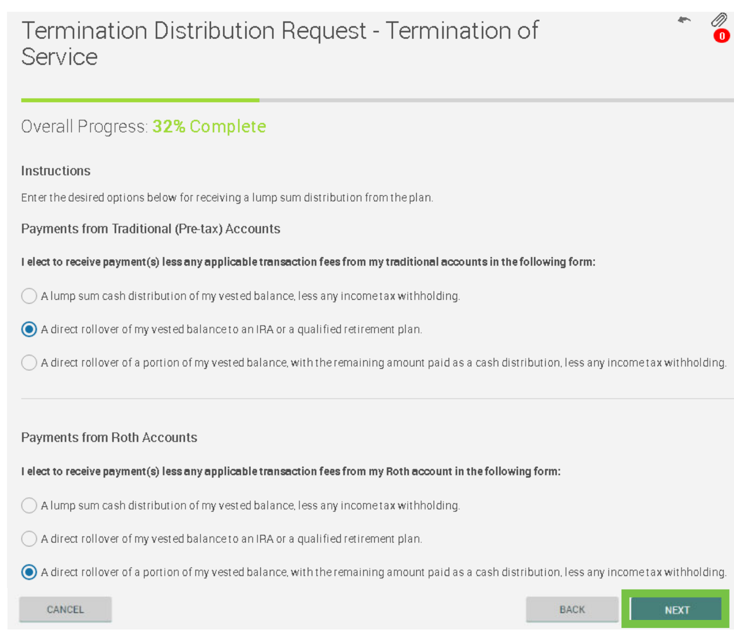
Review and verify your General Information. If updates are needed, go to the **Manage Your Account** tab at the top of this screen and select the **Edit Your Personal Information** option from the dropdown menu.

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.

Choose the payment option(s) that meet your needs and click the **Next** button.

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.

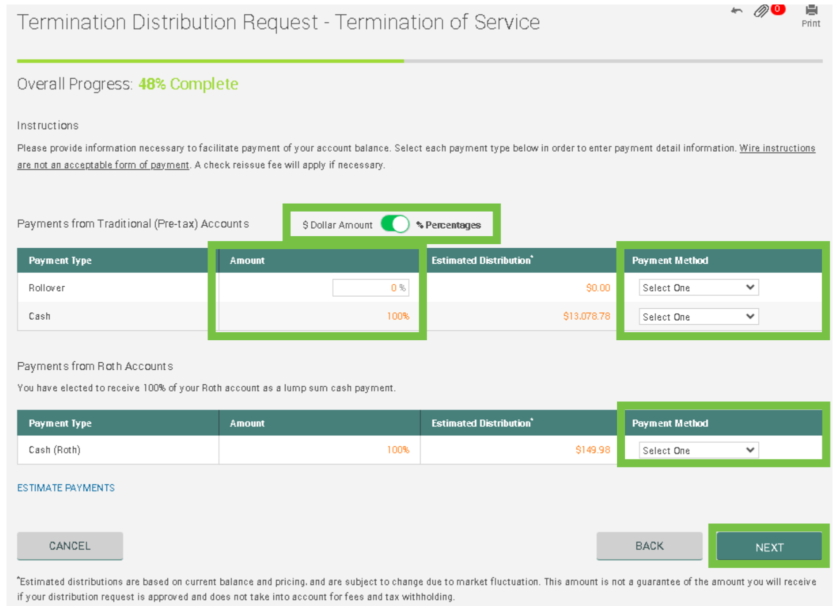


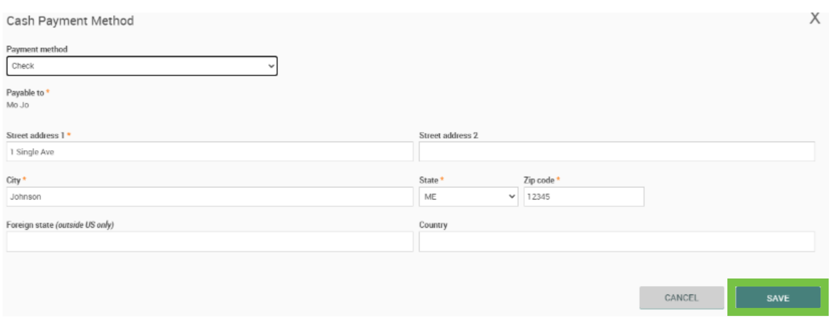
Online Distribution

Review the payment type(s) and estimated amount(s) shown on the next screen. If you chose the option to Rollover a portion of your assets with the remaining amount in cash, choose **Percentage** or **Dollar Amount** for your rollover then indicate the Amount.

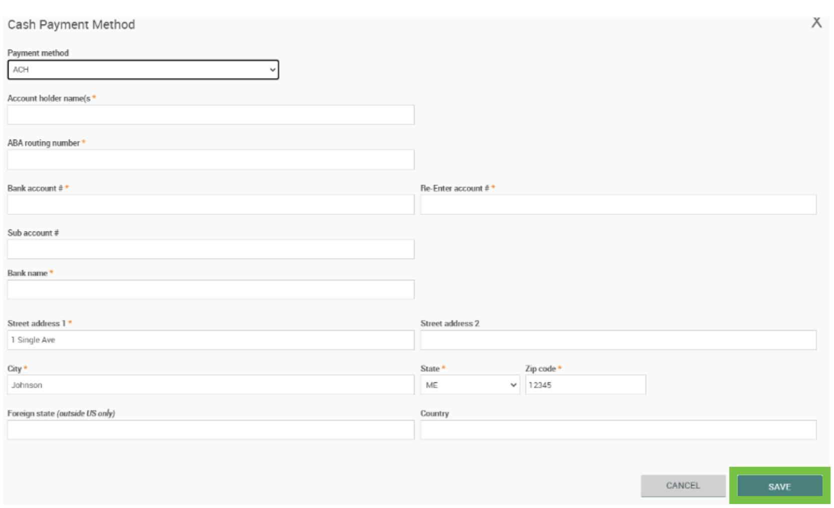
Choose your payment method(s) from the dropdown menus next to each payment type.

Rollover payments are only allowed by check.



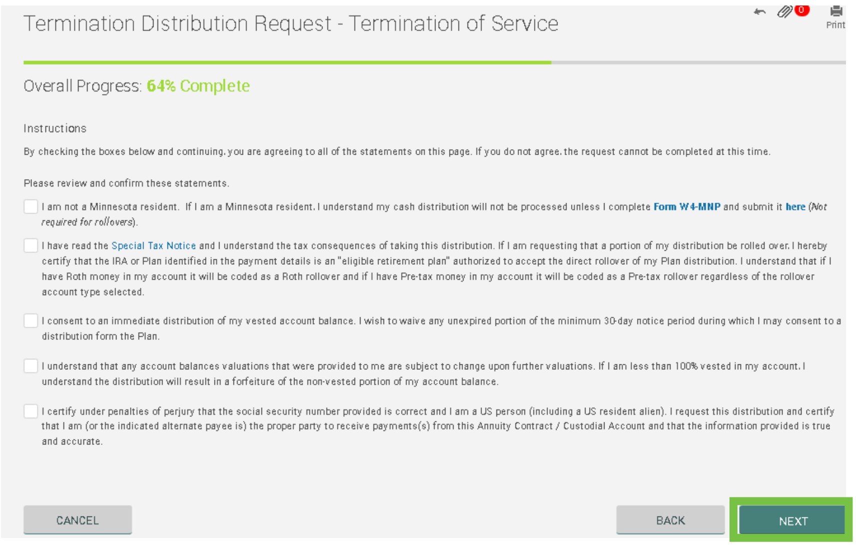


For Check Payment(s), complete the related information, then click the **Save** button. *Fields marked with an asterisk are required.*



For ACH Payment(s), complete the related information, then click the **Save** button. *Fields marked with an asterisk are required.*

Online Distribution

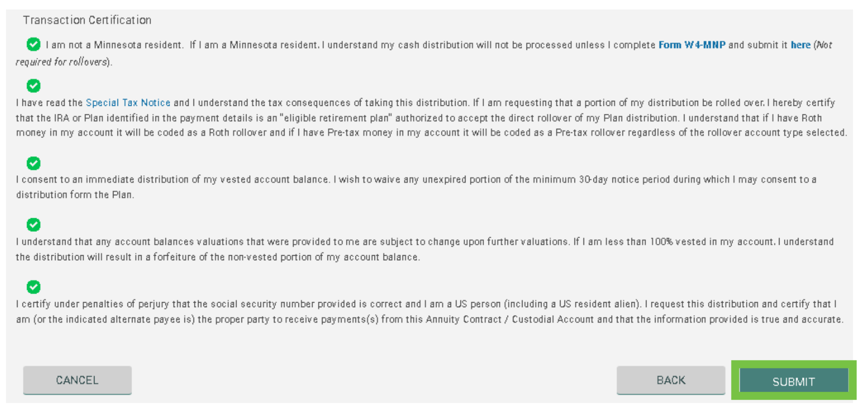


Review and confirm the statements by checking the box to the left of each statement. Then click the **Next** button.

Confirm all details on the final screen are correct, then click the **Submit** button.

If changes are needed, click the **Back** button to make the necessary adjustments.

The **Cancel** button will discontinue the entire distribution request. Your entries will not be saved.



Upon submission, your distribution request will be moved on for the necessary approvals prior to processing.

Please allow 10-14 days for processing. To review the status of your request, go to **Manage Your Account**, then select **Web Requests**.