



Online In Service Distribution

Go to <https://retirementplanconsultants.info> and choose **Account Access**

Type in your **Username** and **Password**

Select role from dropdown menu: **Participant**

Click the **Login** button

Choose **Manage Your Account** and select **Withdrawal Options** from the dropdown.

Select a withdrawal type from the **Withdrawals** dropdown.

Click **GET STARTED**.



Online In Service Distribution

Read the Instructions and click **Next**.

Withdrawal Request - In-service distribution

Print

Overall Progress: 0% Complete

Instructions

PLEASE NOTE: Not all withdrawal options are available online. If your plan allows other options and there is not a selection available under the [Withdrawal Options](#) on the previous page, you will need to fill out a [Distribution Request Form](#).

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. 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.

What you should know about this type of distribution...

The plan allows you to take a withdrawal from your account based on the plan provisions. A plan administrator will review your request and approve the requested withdrawal amount, if allowable.

Maximum Available Amount: \$3,400.23
Transaction Fee: \$100.00

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.

The withdrawal may be considered a [taxable event](#), and you may be required to include the amount as income on your tax return for the year it is distributed. Please consult with a tax advisor if you have any questions about the amount of tax you will owe.

[View the Special Tax notice](#)

CANCEL NEXT

Withdrawal Request - In-service distribution

Print

Overall Progress: 16% Complete

Instructions

Please verify the following personal information. Incorrect address information may delay or prevent the delivery of your payment and important tax statements. If any information is incorrect, it is important to make changes before proceeding with your distribution request.

General Information

First name * Last name *

Employee Test

Marital status Birth date Date of hire

Single 01/01/1960 01/01/2018

Street address 1 * Street address 2

123 Random Street

City * State * Zip code *

Norfolk NE 68701

Country

Home phone

+1 (555) 555-5555

Office phone

+1 Phone Number Ext

Other phone

+1 Phone Number

Receives text messages

Yes No

Receives text messages

Yes No

Receives text messages

Yes No

Email Confirmation Information

CANCEL BACK NEXT

Review your information and click **Next**.

NOTE: If changes are needed, go to **Manage Your Account** and select **Edit Your Personal Information** from the dropdown. Once the information is updated, return to the **Withdrawal Options** page and select **Continue** to proceed with your request.

Enter the amount you would like to withdraw and click **Calculate**.

Withdrawal Request - In-service distribution

Print

Overall Progress: 32% Complete

Instructions

Enter the desired options below for receiving withdrawal payments from the plan.

Withdrawal Amount

Attainment of Normal Retirement Age

Minimum: \$0.00
Maximum: \$3,399.94

☒ Amount: \$ 1500

☐ Withdraw my maximum available balance.

If you elect to withdraw the maximum available, the actual amount of your withdrawal may increase or decrease depending on the market price used to sell your investments.

CALCULATE



Online In Service Distribution

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

Cash Withdrawals may be taxable and will be paid out to you less any required federal and/or state tax withholdings.

Rollover Requests are non-taxable rollovers to an IRA or qualified retirement plan.

Withdrawal Request - In-service distribution

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.

Payments from Traditional Accounts

You have elected to receive a rollover payment from your Traditional account.

Payment Type	Amount	Estimated Distribution*	Payment Method
Rollover	100.00%	\$786.88	Select One

Payments from Roth Accounts

\$ Dollar Amount ☒ % Percentages

Payment Type	Amount	Estimated Distribution*	Payment Method
Rollover (Roth)	0%	\$0.00	Select One
Cash (Roth)	100%	\$713.12	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.

For Check Payment(s), complete the related information, then click **Save**.

NOTE: Fields marked with an asterisk are required.

Cash Payment Method

Payment method
Check

Payable to *

Mrs. Jo

Street address 1 *

1 Single Ave

Street address 2

City *

Johnson

State *

ME

Zip code *

12345

Foreign state (outside US only)

Country

CANCEL

SAVE

Cash Payment Method

Payment method
ACH

Account holder name(s) *

ABA routing number *

Bank account # *

Re-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

For ACH Payment(s), complete the related information, then click **Save**.

NOTE: Fields marked with an asterisk are required.



Online In Service Distribution

Withdrawal Request - In-service distribution



Overall Progress: **64% Complete**

Instructions

By checking the box below and continuing, you are agreeing to all of the statements on this page.

Please review and confirm these statements.

- ☐ I understand if I am taking a cash distribution I must refer to the current tax withholding rules or reach out to my tax advisor for clarification on the rules in my state. If my state requires completion of a form to reduce or opt out of the mandatory withholding and that is the option I wish to apply I must complete the form and upload it to your secure site. If no form is submitted, and a state tax withholding applies, I understand it will be calculated based on my state's applicable minimum withholding requirement.
- ☐ 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 balance 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 payment(s) from this Qualified Retirement Account and that the information provided is true and accurate.
- ☐ I understand that the amount requested, plus the distribution fee disclosed in the [404\(a\)\(5\) Fee Disclosure Report](#), will be distributed proportionally from my fully vested sources and associated investment holdings.

CANCEL

BACK

NEXT

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

Read and select the boxes to the left of each statement, then click **Next**.

Payment Information

Payments from Traditional Accounts

You have elected to receive a rollover payment from your Traditional account.

Payment Type	Amount	Estimated Distribution*	Payment Method
Rollover		100.00%	\$786.71 Check
Account holder name(s)			
Bank Name	Check Rollover		
Address	123 Address		
City	City		
State, Zip	NE 55555		
Country			
Foreign state (outside US only)	Country		
Rollover to	IRA	Rollover account #	*****6789

Payments from Roth Accounts

Percent

Payment Type	Amount	Estimated Distribution*	Payment Method
Rollover (Roth)		40.00%	\$285.32 Check
Account holder name(s)			
Bank Name	Check Rollover		
Address	Test Address		
City	City		
State, Zip	NE 55555		
Country			
Foreign state (outside US only)	Country		
Rollover to	IRA	Rollover account #	*****6789
Cash (Roth)		60.00%	\$427.97 Check
Address			
123 Random Street			
City			
Norfolk			
State, Zip			
NE 68701			
Country			
Foreign state (outside US only)			
Federal taxes will be withheld from your payment at the standard rate of 20%.			
Additional federal tax to withhold \$0.00			
Additional state tax to withhold \$0.00			

*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.

Transaction Certification



I understand if I am taking a cash distribution I must refer to the current tax withholding rules or reach out to my tax advisor for clarification on the rules in my state. If my state requires completion of a form to reduce or opt out of the mandatory withholding and that is the option I wish to apply I must complete the form and upload it to your secure site. If no form is submitted, and a state tax withholding applies, I understand it will be calculated based on my state's applicable minimum withholding requirement.



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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.



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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 payment(s) from this Qualified Retirement Account and that the information provided is true and accurate.



I understand that the amount requested, plus the distribution fee disclosed in the [404\(a\)\(5\) Fee Disclosure Report](#), will be distributed proportionally from my fully vested sources and associated investment holdings.

CANCEL

BACK

SUBMIT

Once approved by your Plan Sponsor, please allow 10-14 days for processing.

To review the status of your request, go to **Manage Your Account**, then select **Web Requests**.