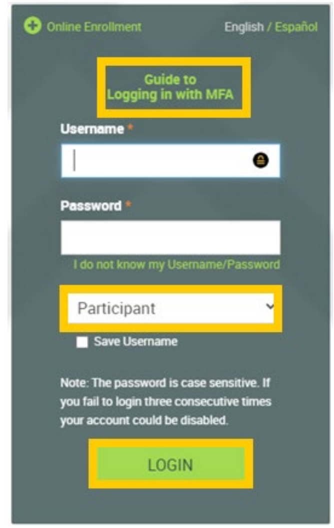
Online In Service Distribution

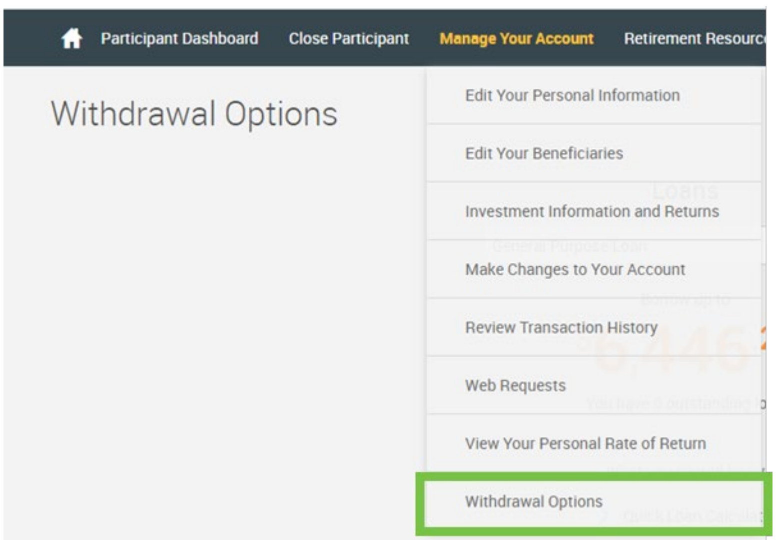
Go to https://retirementplanconsultants.info and choose **Account Access**



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

Select role from dropdown menu: **Participant**

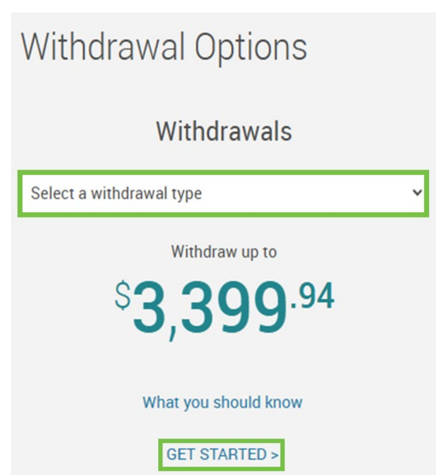
Click the **Login** button



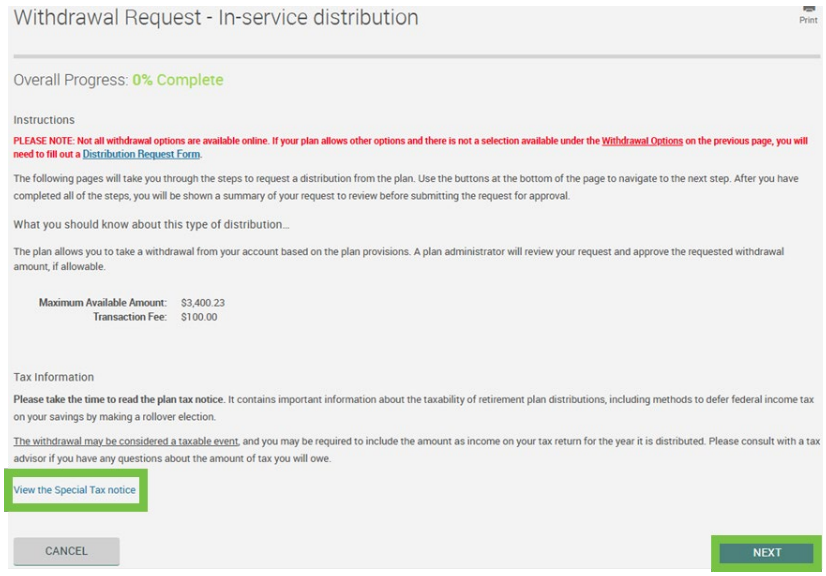
Choose **Manage Your Account** and select **Withdrawal Options** from the dropdown.

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

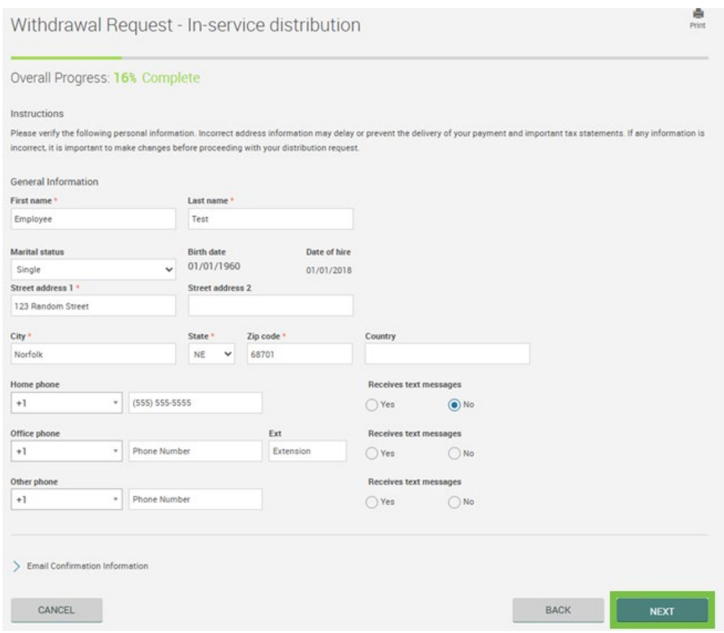
Click **GET STARTED**.



Online In Service Distribution

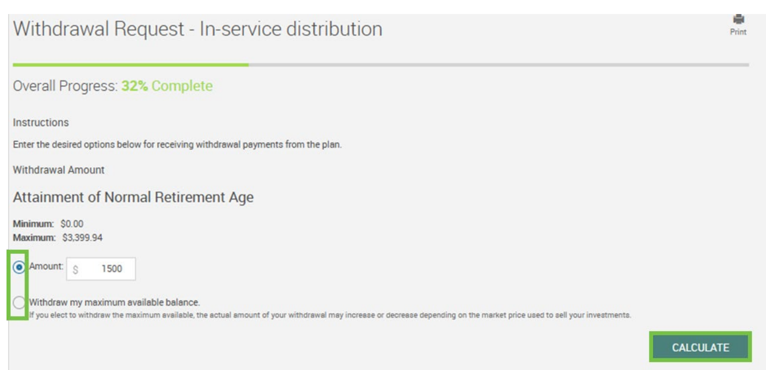


Read the Instructions and click **Next**.



Review your information and click **Next**.

<u>NOTE:</u> *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.*



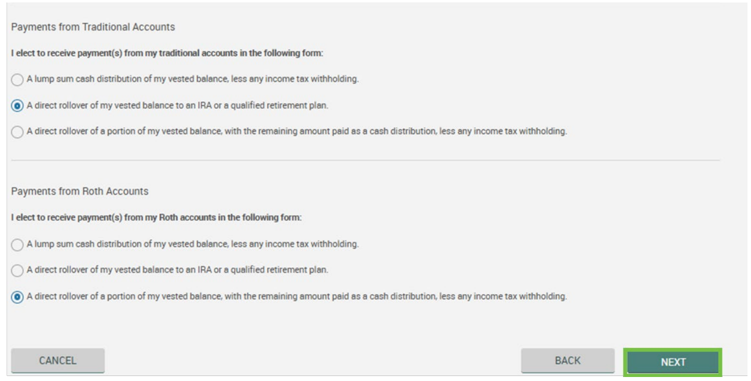
Enter the amount you would like to withdraw and click **Calculate.**

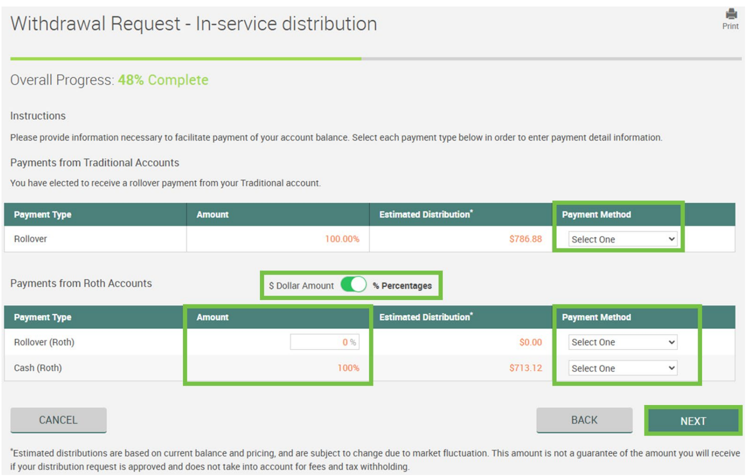
Online In Service Distribution

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.



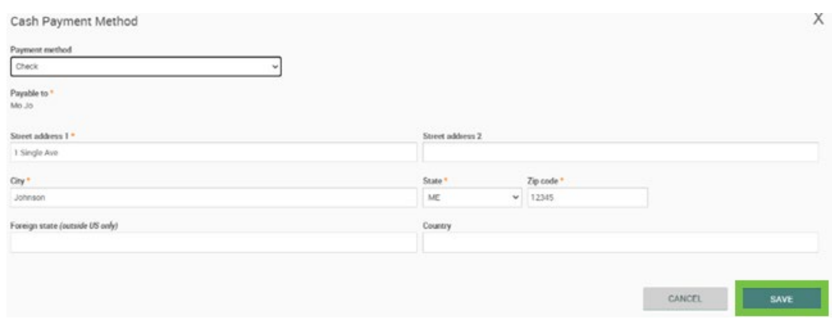


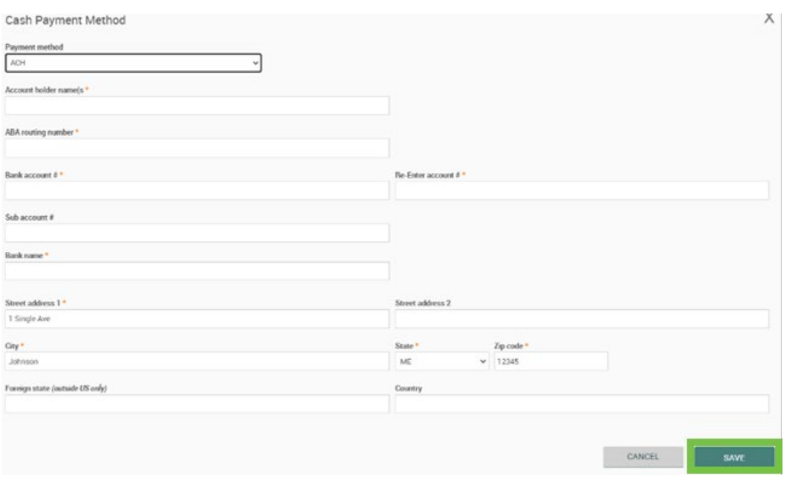
Review the payment type(s) and estimated amount(s) and select your payment method(s) from the dropdown menu(s).

***NOTE**: Rollover payments are only allowed by check.*

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

***NOTE**: Fields marked with an asterisk are required.*

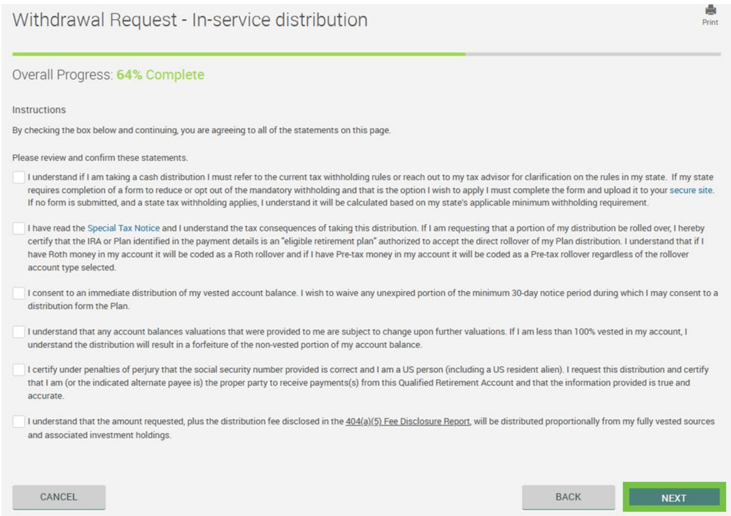




For ACH Payment(s), complete the related information, then click **Save**.

***NOTE**: Fields marked with an asterisk are required.*

Online In Service Distribution



Withdrawal Request - In-service distribution

Print

Overall Progress: 64% Complete

Instructions

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

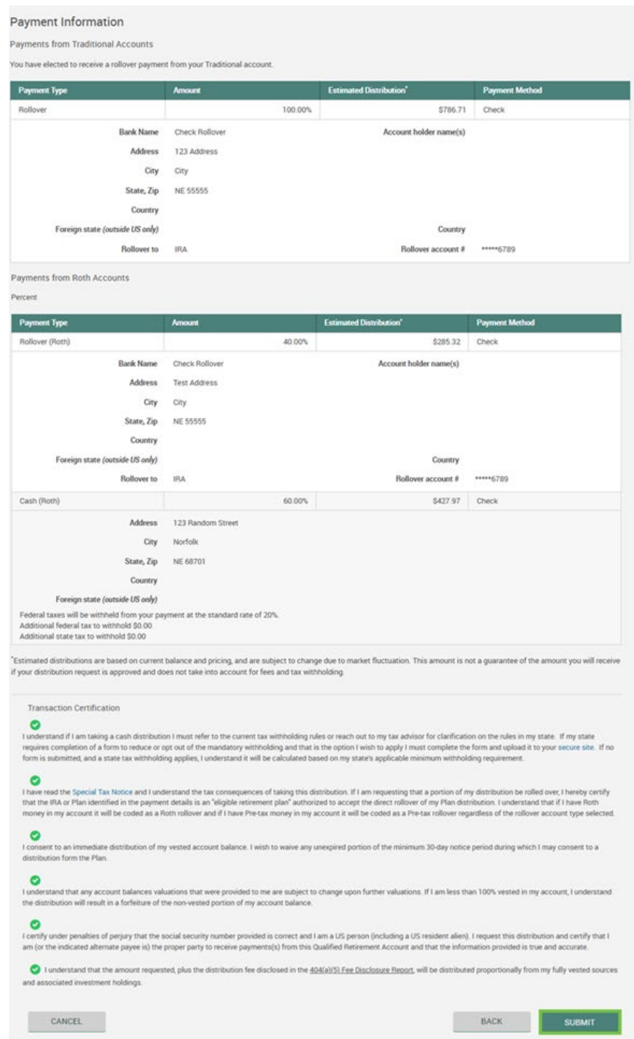
Please review and confirm these statements.

- [ ] 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 form 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 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

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

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



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

Bank Name: Check Rollover
Account holder name(s):
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
Cash (Roth)	60.00%	$427.97	Check

Rollover (Roth):
Bank Name: Check Rollover
Account holder name(s):
Address: Test Address
City: City
State, Zip: NE 55555
Country:
Foreign state *(outside US only)*:
Country:
Rollover to: IRA
Rollover account #: *****6789

Cash (Roth):
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.
- 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 form 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 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**.