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.

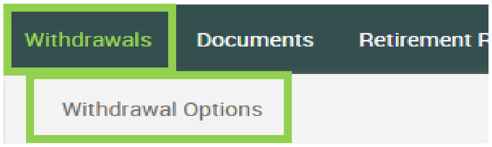
Rollover: You may transfer funds from your retirement to your new employer's retirement plan or an Individual Retirement Account. There are no penalties or taxes for requesting a rollover distribution.

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.

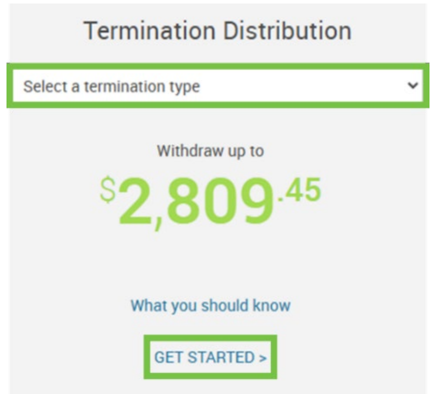
To request a distribution from your account, please see the following pages for a step-by-step guide to help you log into your retirement account and start the distribution process.

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

Online Termination Distribution

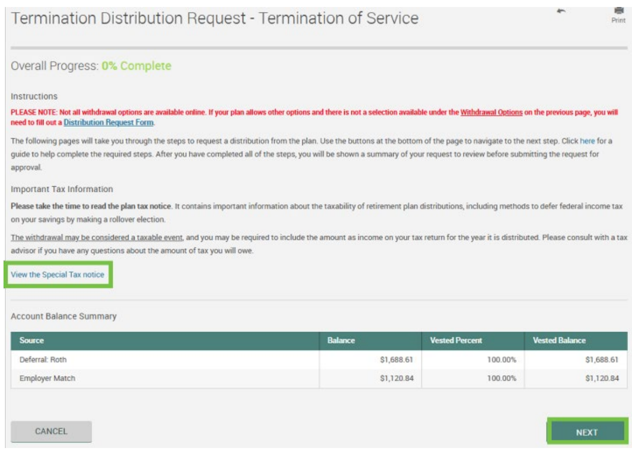


Select **Withdrawal Options** from the menu.



Select **Termination of Service** from the **Termination Distribution** dropdown.

Click **GET STARTED**.

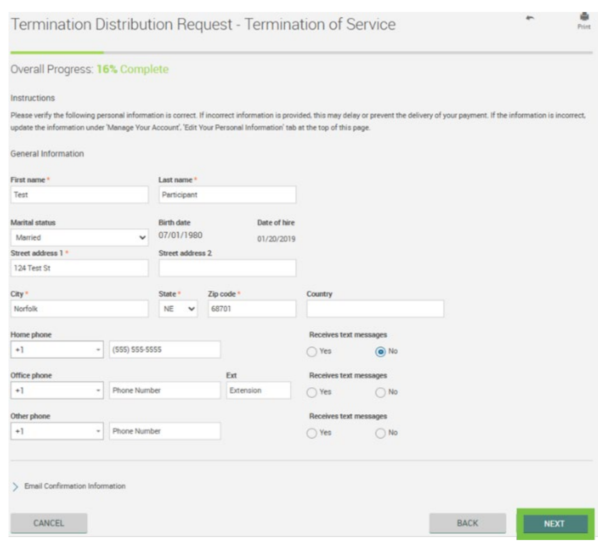


Read the Instructions and click **Next**.

Review your information and click **Next**.

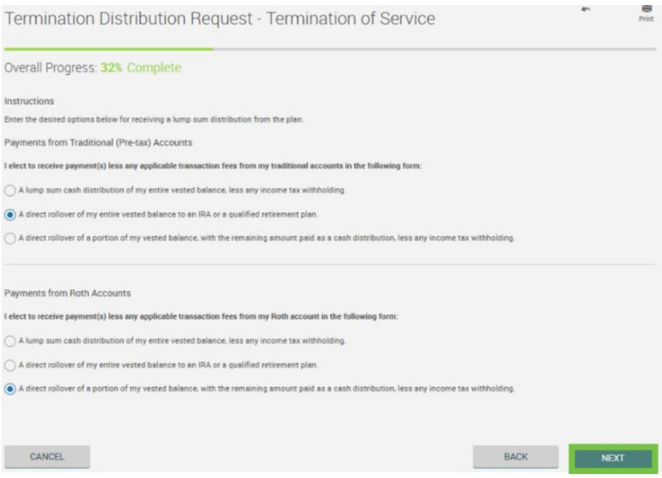
<u>If changes are required</u>, select **Account** then **Edit Your Personal Information** from the top menu. Make your changes, then return to your distribution request.

<u>If no change are required</u>, click **NEXT.**



Go to: https://www.retirementplanconsultants.info/login.
Contact RPC at 877-800-1114 for login assistance.

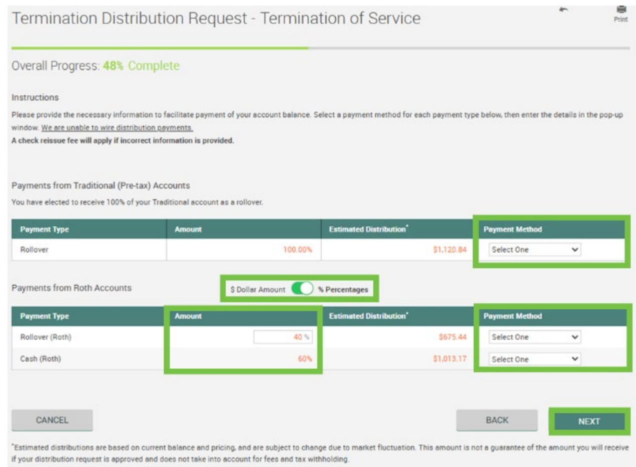
Online Termination Distribution



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

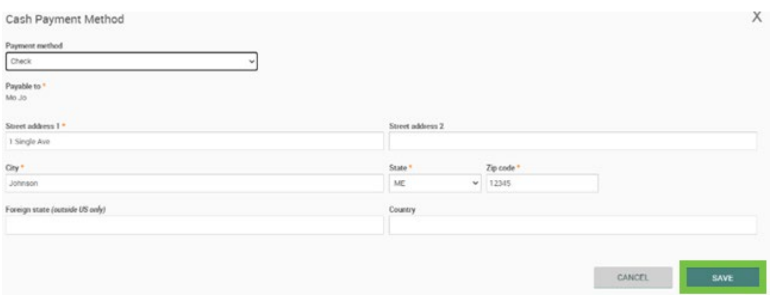
Cash Withdrawals are taxable and will be paid out to you less any federal and/or state tax withholdings.

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



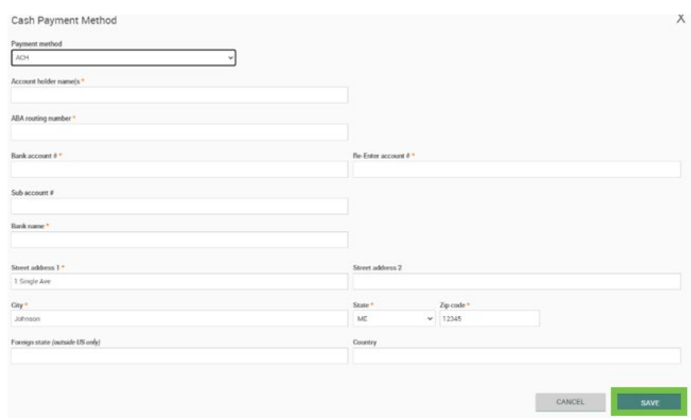
Review the payment type(s) and estimated amount(s) and select your payment method(s) from the dropdown menu(s).

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



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

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



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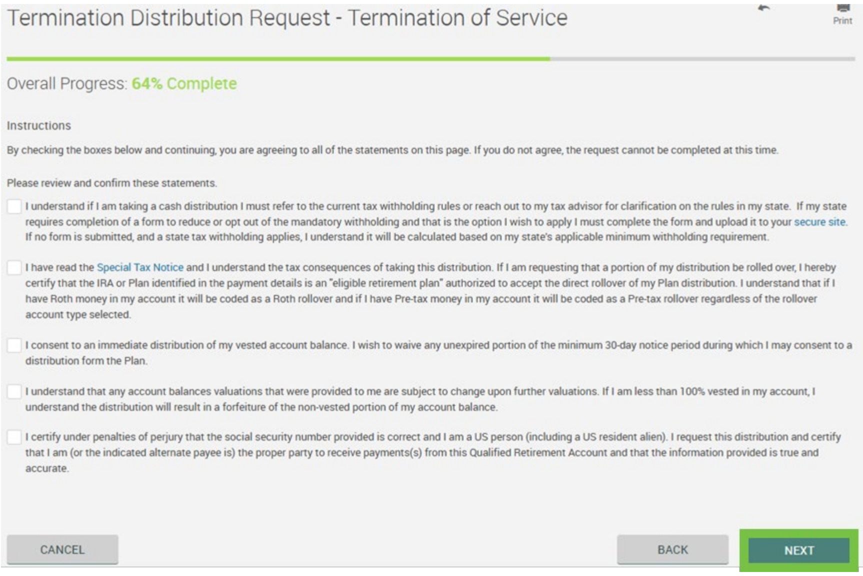
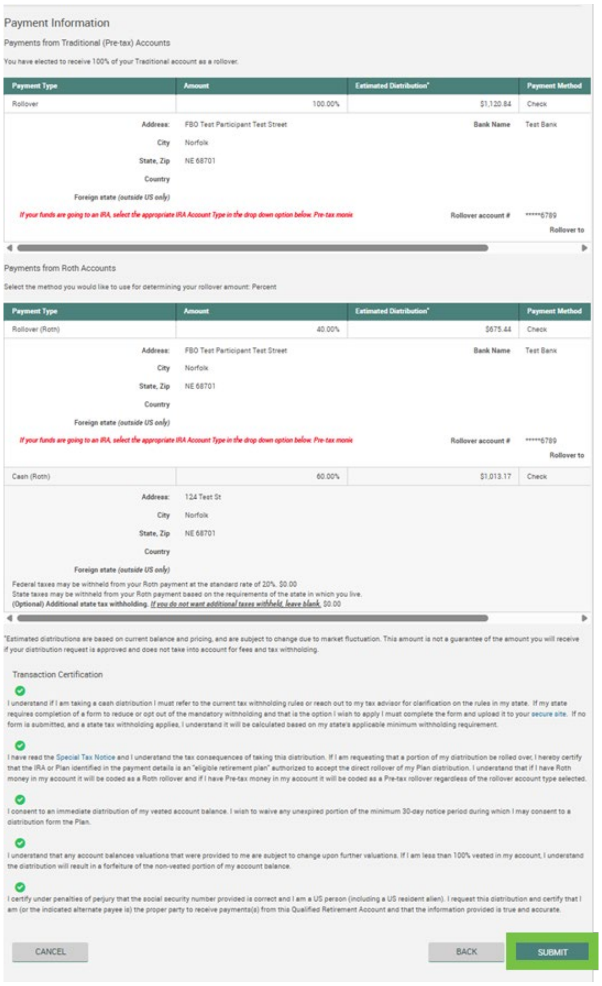


Read and select the boxes to the left of each statement, then click **Next**.



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

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

To review the status of your request, go to the **Account** tab and then select **Web Requests** from the dropdown menu.