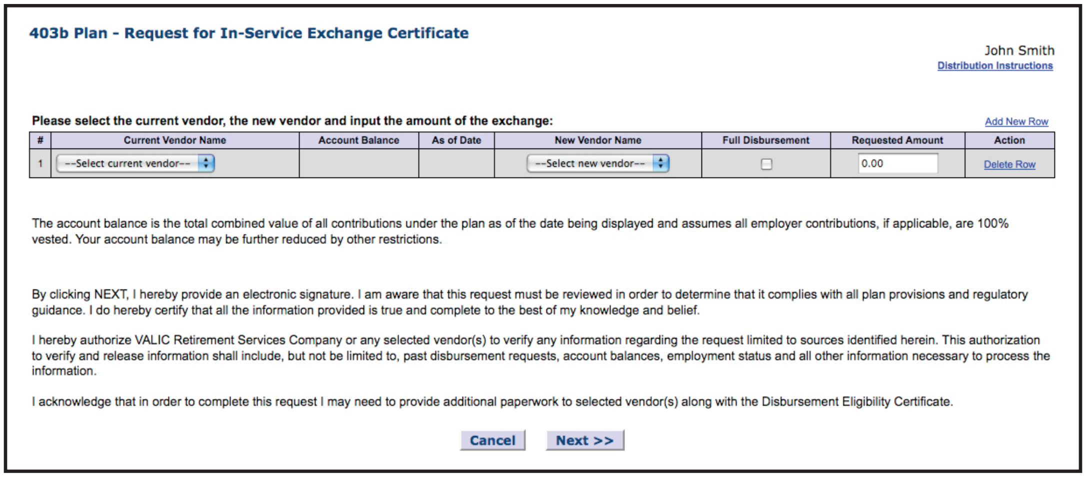
# How To Submit an In-Service Distribution Request

**STEP 1** – Log in to Retirement Manager (https://www.myretirementmanager.com/) and click the ***Disbursements*** tab at the top of the page, then select ***In-Service Exchange Certificate*** link.



403b Plan - Request for In-Service Exchange Certificate

John Smith
Distribution Instructions

Please select the current vendor, the new vendor and input the amount of the exchange:

Add New Row

| # | Current Vendor Name | Account Balance | As of Date | New Vendor Name | Full Disbursement | Requested Amount | Action |
|---|---|---|---|---|---|---|---|
| 1 | --Select current vendor-- | | | --Select new vendor-- | ☐ | 0.00 | Delete Row |

The account balance is the total combined value of all contributions under the plan as of the date being displayed and assumes all employer contributions, if applicable, are 100% vested. Your account balance may be further reduced by other restrictions.

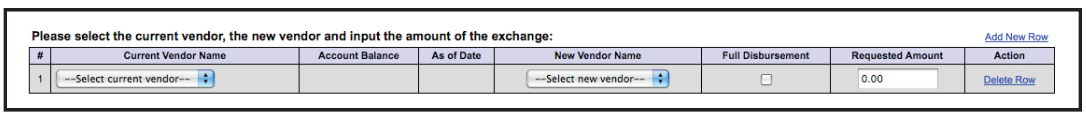
By clicking NEXT, I hereby provide an electronic signature. I am aware that this request must be reviewed in order to determine that it complies with all plan provisions and regulatory guidance. I do hereby certify that all the information provided is true and complete to the best of my knowledge and belief.

I hereby authorize VALIC Retirement Services Company or any selected vendor(s) to verify any information regarding the request limited to sources identified herein. This authorization to verify and release information shall include, but not be limited to, past disbursement requests, account balances, employment status and all other information necessary to process the information.

I acknowledge that in order to complete this request I may need to provide additional paperwork to selected vendor(s) along with the Disbursement Eligibility Certificate.

Cancel Next >>

**STEP 2** – Make the required entries. The Account Balance and As of Date are displayed for the vendor selected. Check the ***Full Disbursement*** box if you want to transfer all funds to another vendor.



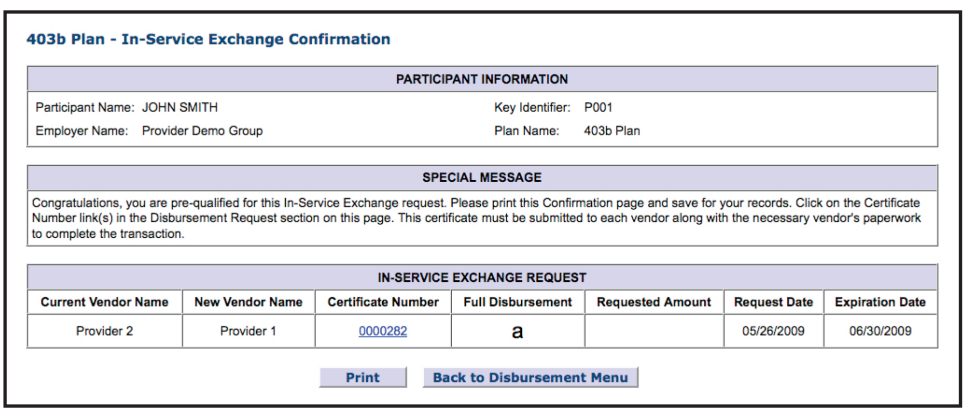
Please select the current vendor, the new vendor and input the amount of the exchange:

Add New Row

| # | Current Vendor Name | Account Balance | As of Date | New Vendor Name | Full Disbursement | Requested Amount | Action |
|---|---|---|---|---|---|---|---|
| 1 | --Select current vendor-- | | | --Select new vendor-- | ☐ | 0.00 | Delete Row |

**STEP 3** – Click ***NEXT*** to complete or ***CANCEL*** the transaction.

After clicking ***NEXT***, the confirmation page will display.



403b Plan - In-Service Exchange Confirmation

PARTICIPANT INFORMATION

Participant Name: JOHN SMITH    Key Identifier: P001
Employer Name: Provider Demo Group    Plan Name: 403b Plan

SPECIAL MESSAGE

Congratulations, you are pre-qualified for this In-Service Exchange request. Please print this Confirmation page and save for your records. Click on the Certificate Number link(s) in the Disbursement Request section on this page. This certificate must be submitted to each vendor along with the necessary vendor's paperwork to complete the transaction.

IN-SERVICE EXCHANGE REQUEST

| Current Vendor Name | New Vendor Name | Certificate Number | Full Disbursement | Requested Amount | Request Date | Expiration Date |
|---|---|---|---|---|---|---|
| Provider 2 | Provider 1 | 0000282 | a | | 05/26/2009 | 06/30/2009 |

Print Back to Disbursement Menu

**STEP 4** – To access the certificate, click on the link under the Certificate Number. The certificate should be printed and submitted to your vendor along with any other required paperwork for approval.


VC 22616 (06/2009) J74281