Brokerage Account Transfers

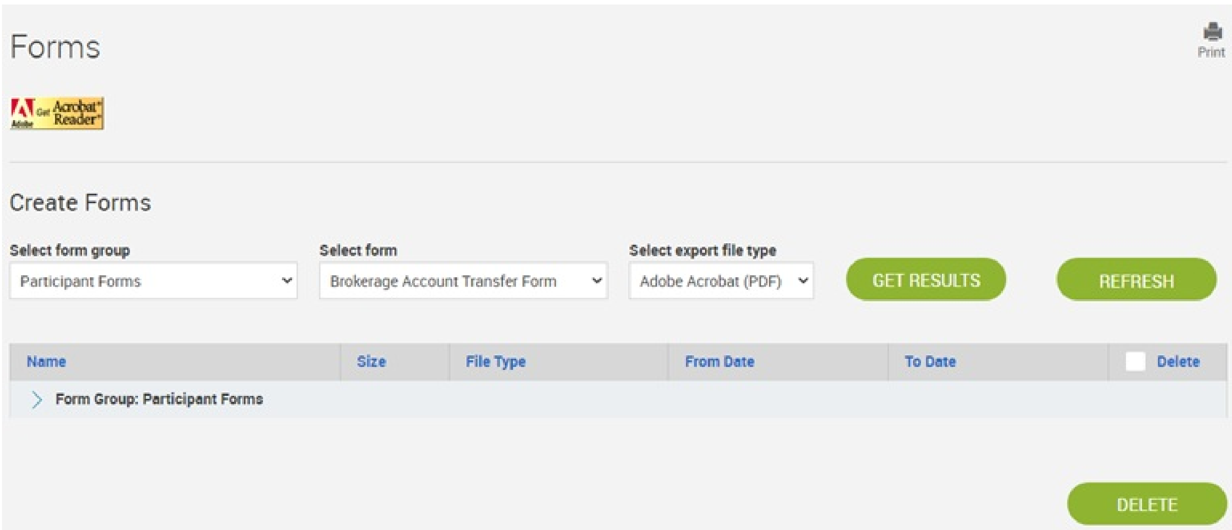
If your plan allows for Brokerage Accounts and you have set one up for your account, you are able to move funds from your retirement plan into your brokerage account.

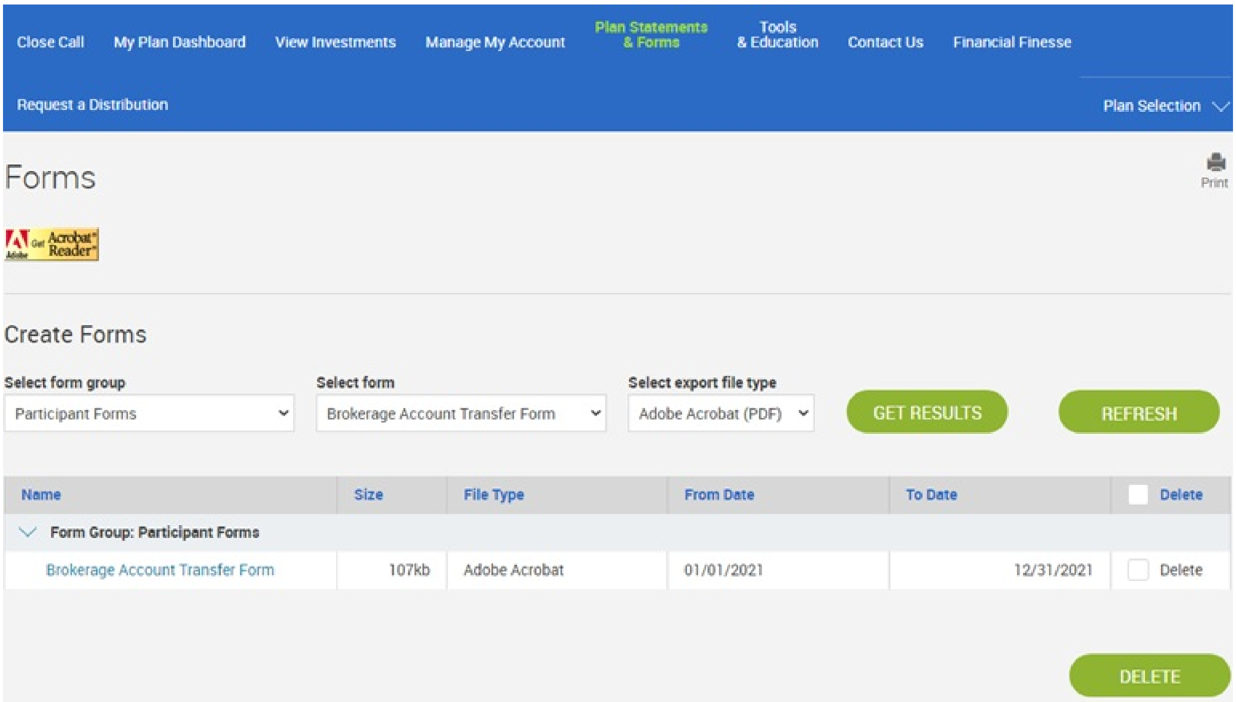
Making transfers between your retirement plan account and your brokerage account is simple and can be initiated online.

Log into your online account to begin the process.

1. **Complete the online brokerage account transfer form**.

- Access the form by selecting **Plan Statements & Forms** and then selecting **Forms** from the menu.
- Select the **Brokerage Account Transfer** form and click **Get Results**. You will be prompted to open form. You can also expand Participant Forms to see all previously generated forms.
- Once you have launched the form, click Request Transfer for This Account.





2. **Complete and Submit online form**

3. **Email Notifications**: You will receive email notifications throughout the process so you will know the status of your trade.

- Received (In Review)
- In Process (Being Traded)
- Rejected (email will include reason for rejection and comments)
- Complete (Settled)