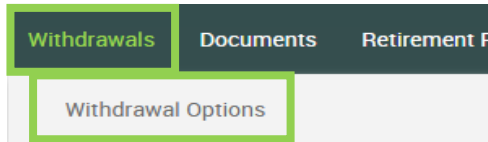




Online In Service Distribution



Select **Withdrawal Options** from the menu.

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

Click **GET STARTED**.

Read the Instructions and click **Next**.

Review your information and click **Next**.

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

If no change are required, click **NEXT**.

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



Online In Service Distribution

Withdrawal Request - In-service distribution

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

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

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.

Payments from Traditional Accounts

I elect to receive payment(s) from my traditional accounts in the following form:

☐ A lump sum cash distribution of my vested balance, less any income tax withholding.

☒ A direct rollover of my vested balance to an IRA or a qualified retirement plan.

☐ A direct rollover of a portion of my vested balance, with the remaining amount paid as a cash distribution, less any income tax withholding.

Payments from Roth Accounts

I elect to receive payment(s) from my Roth accounts in the following form:

☐ A lump sum cash distribution of my vested balance, less any income tax withholding.

☐ A direct rollover of my vested balance to an IRA or a qualified retirement plan.

☒ A direct rollover of a portion of my vested balance, with the remaining amount paid as a cash distribution, less any income tax withholding.

CANCEL **BACK** **NEXT**

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%	\$789.86

Payments from Roth Accounts

☒ \$ Dollar Amount ☐ % Percentages

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

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.

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.

Cash Payment Method

Payment method:

Payable to *
Mr. Jo

Street address 1 *
1 Single Ave

City *
Johnson

Foreign state (outside US only)

Street address 2

State *
ME

Zip code *
12345

Country

CANCEL **SAVE**

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



Online In Service Distribution

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 *

Street address 2

City *

State *

Zip code *

Country

Foreign state (outside US only)

CANCEL SAVE

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

NOTE: Fields marked with an asterisk are required.

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
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 # *****789			

Payments from Roth Accounts

Percent

Payment Type	Amount	Estimated Distribution*	Payment Method
Rollover (Roth)	80.00%	\$385.32	Check
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 # *****789			
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.

☒ 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 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 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 [Annual/31 Fee Disclosure Report](#), will be distributed proportionally from my fully vested sources and associated investment holdings.

CANCEL BACK SUBMIT

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 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 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 [Annual/31 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.

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.

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