

How to roll in with ease

Let us know that you want to roll in money to your account by completing an online request.

To get started, log into Account Access (www.icmarc.org), click **Overview**, and then select **Roll In Your Money**.

Start by telling us the following:

- Name of previous plan provider
- Account balance you want to roll in
- Account you want to roll your funds into
- How you want to invest your roll-in funds

Submit your paperwork from the previous plan provider along with our letter of acceptance (LOA).

- Your previous plan provider will require that you complete their rollout paperwork and attach a document referred to as an LOA that acknowledges we'll accept your roll-in.
- You'll find a copy of your LOA in the File Vault under the Messages & Alerts menu, in Account Access.
- Double-check if your previous plan provider required a signature guarantee on their paperwork.

We'll keep you updated on your request.

- You'll receive a confirmation email with instructions on how to complete your roll-in request, including obtaining the previous plan provider's paperwork and attaching it to the LOA.

We're here to help.

- We'll gladly contact your previous plan provider to assist with the process. You can also schedule an appointment with our Roll-in Specialist to address any questions along the way.

We'll let you know once we've received your roll-in funds.

- We'll send you an email confirming receipt of the funds. You can verify this information in the Transaction History section of Account Access.

Read our [Retirement Account Roll-in Decisions](#) flyer for more information.

To learn more, contact your MissionSquare Retirement representative.