

HOW TO ROLL OVER YOUR MONEY TO YOUR ACCOUNT WITH ICMA-RC



Let us know about your intent to roll over your money to your account with ICMA-RC by completing an online request. To get started, log in to Account Access (www.icmarc.org/login), click “Overview,” then select “Roll Over Your Money.”

START BY TELLING US THE FOLLOWING:

- ▶ Name of your previous plan provider
- ▶ Anticipated account balance you wish to roll over
- ▶ Account you wish to roll over your funds into
- ▶ How you wish to invest your rollover funds

SUBMIT YOUR PAPERWORK FROM THE PREVIOUS PLAN PROVIDER ALONG WITH ICMA-RC’S 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 will accept your rollover.
- ▶ You’ll find a copy of your LOA in the File Vault under the Messages & Alerts menu, after logging in to Account Access (www.icmarc.org/login).
- ▶ Double check if your previous plan provider required a signature guarantee on their paperwork.

WE’LL KEEP YOU INFORMED ABOUT THE PROGRESS OF YOUR REQUEST.

- ▶ For instance, you’ll receive a confirmation email of your request with instructions on how to complete your rollover request, including obtaining the previous plan provider’s paperwork and attaching it to the LOA that can be downloaded from the File Vault in Account Access.

WE’RE HERE TO ASSIST YOU.

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

WE’LL LET YOU KNOW ONCE WE HAVE RECEIVED YOUR ROLLOVER FUNDS.

- ▶ Once we have received your rollover money, we’ll send you an email confirming receipt of the funds. You may verify this in the Transaction History section of Account Access.



If you have questions, please reach out to your ICMA-RC representative.
Read our [Retirement Account Rollover Decisions](#) flyer for more information.