Retirement Manager: Request An In-Service Exchange Certificate
Current HISD Employees

Retirement Manager is the convenient, secure, Web-based access point to manage your HISD retirement plan accounts anytime - anywhere, 24 hours a day, seven days a week. To access Retirement Manager, simply go to: www.myretirementmanager.com.

Retirement Manager uses eligibility certificates to pre-qualify you for a Hardship Withdrawal from your retirement plan. To begin requesting a certificate, select “Request a Withdrawal” from the left menu on the home page. Please note that the screen shots on this page are examples, and may vary based on your plan.

Select a plan:
To request a withdrawal, first select your retirement plan. Make your selection from the plans that are eligible for a distribution.

Select withdrawal type:
The types of withdrawals available to you will depend on the retirement plan you selected, your current employment status, and the types of withdrawals offered by your employer. If you are unsure what type of withdrawal you need, please contact your employer or financial advisor. Select “In-Service Exchange” as the distribution type from the drop-down menu that is on the right side of the screen.
NOTE:
An informative window will appear informing you of possible fees or penalties. Click “Close” to proceed.

Find Your Current Provider:
Your current provider(s), along with an account balance and the corresponding date for the balance, will be displayed. Find the row for the provider of the account you would like to move your funds out of and select the arrow for the drop down menu to the right of the box that reads “Please select provider...” under the New Provider Name column. Note: If your investment provider is not list under the Current Provider Column, click on yes under the question “Would you like to add a request from an investment provider not listed above?”

Select Your New Provider and Exchange Amount:
A list of providers will appear. Select the provider you would like to move your funds to from the list. Next, select the amount you would like to move to your new provider. If you want to move all of your funds it is best to use the Full Disbursement check-box. You may also type in an amount in the Requested Amount box. Click on “Submit” to proceed.

Confirmation/Print Certificate(s):
If your request for an In-Service Exchange was successful a confirmation page should appear. The confirmation page will contain a link to print your certificate(s). Click on the “View and Print Certificate” button. A new window containing your certificate will appear. Be sure to print and submit the certificate(s) along with any supporting paperwork to your provider by the expiration date on the certificate. If your request was not approved, a message will display, contact your employer with any questions.