

## Retirement Manager: Request a Loan Certificate

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](http://www.myretirementmanager.com) and login with your User ID and Password.

Retirement Manager uses eligibility certificates to pre-qualify you for a loan from your retirement plan. To begin requesting a certificate, select "Request a Loan" 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.

RetirementManager

Home My Profile Message Center Logout

Search SSN/Employee ID

**MY SAVINGS MANAGER**  
I would like to...  
Start or Change my Contributions  
**Request a Loan**  
Request a Withdrawal

**PLAN INFORMATION**  
View details on...  
My Balances  
My Plan Information  
My Investment Provider Contacts

**FINANCIAL TOOLS**  
Show me more about...  
Financial Education  
Glossary of Terms  
Am I On Target  
Financial Calculators  
Financial Seminars

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

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**MY SAVINGS MANAGER**  
Start or Change my Contributions  
Request a Loan  
**Select Plan**  
Review/Add Prior Transactions  
Input Loan Request  
Confirmation  
Request a Withdrawal

**To request a loan, select a plan:**  
Select a plan...  
Select a plan...  
Houston Independent School District 403(b) Plan  
Houston Independent School District 457(b) Plan

**PLAN INFORMATION**

**FINANCIAL TOOLS**

**Review and/or add prior loan transactions:**

Retirement Manager will display any previous loan transactions that will be used to pre-qualify your loan. If there are any transactions missing, you should add them by following the screen prompts at the bottom of the page.

Once the information on the screen is complete, click the "Next" button.

**Please Note:** if a previous loan is reported as defaulted you will not be eligible for a new one.

**Complete your loan request:**

Input the amount for your requested loan. If you do not see your investment provider listed, you may manually add your provider following the prompts on the screen. Once you have input your amount for your provider(s), be sure to complete any additional questions that may be specific to the loan you are requesting. Click on "Submit" to proceed to your certificate.

**Confirmation/Print Certificate(s):**

If your loan request 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.

Participant Name:	Employer Name:	Houston Independent School District
Last Four Digits of SSN:	Plan Name:	Houston Independent School District 403(b) Plan

Plan Name	Investment Provider Name	Effective Date Of Data	Original Loan Effective Date	Loan Status	Current Outstanding Loan Balance	Highest Loan Balance Previous 12 Months	Current Account Balance	Current Account Balance as of Date
No Data on Record								