

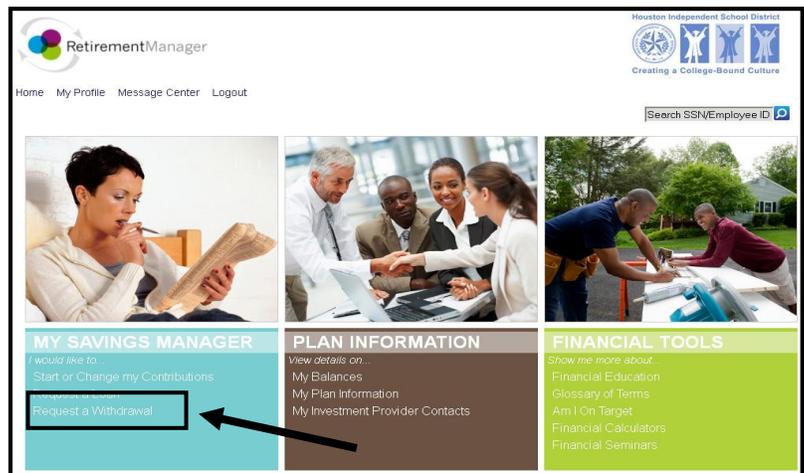
## Retirement Manager: Request A Withdrawal Certificate Former HISD Employees

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](http://www.myretirementmanager.com).

If you are no longer an active employee with HISD, a certificate is available on Retirement Manager that will show that you have separated from service with the district. If you separated after January 1, 2000, a Separation from Service Certificate can be used for transactions including: withdrawals, exchange, transfers, rollovers, cash annuitizations, or other income options.

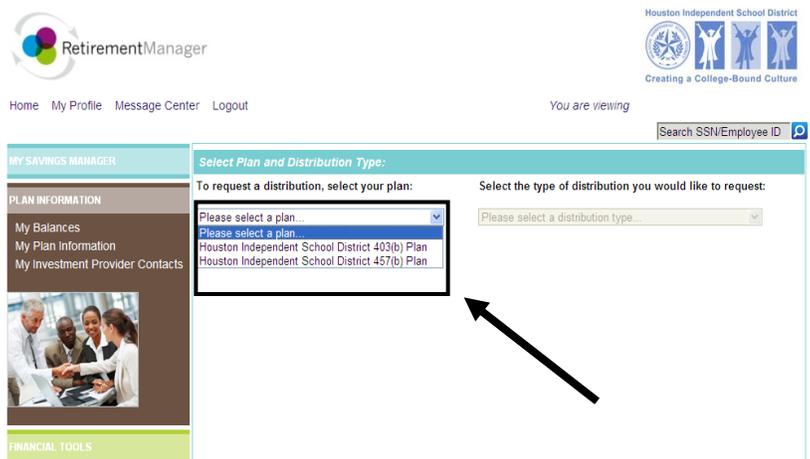
### **Request a Withdrawal:**

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.



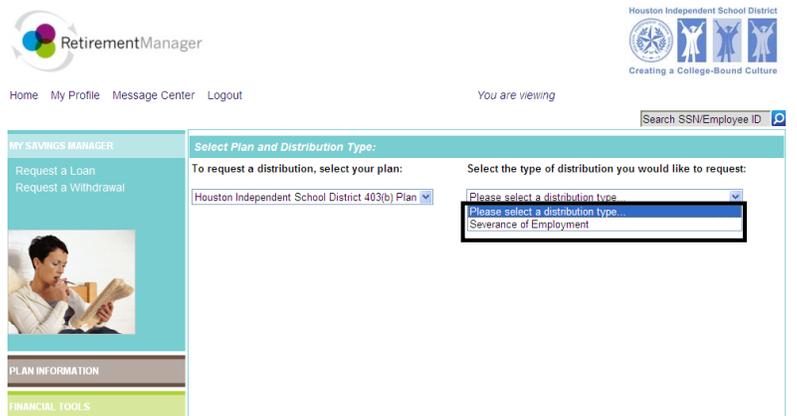
### **Select a plan:**

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



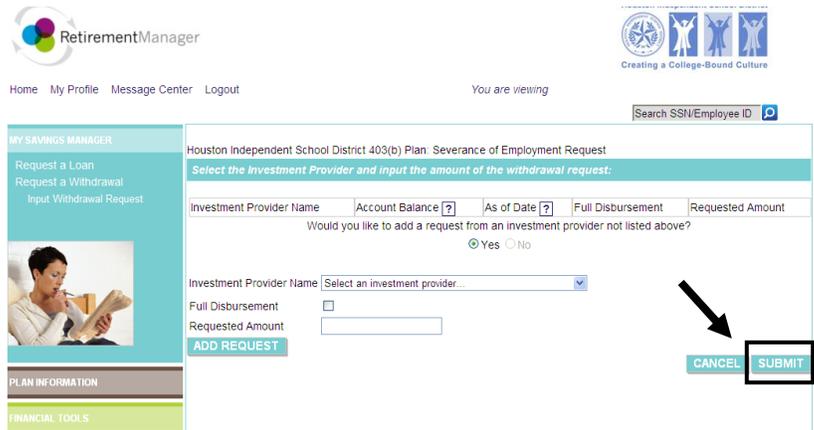
### **Select withdrawal type:**

If your HISD Service Status is inactive, an option for a “Severance of Employment” Certificate will appear. Click on the “Severance of Employment” option to proceed to the next step.



### Complete your withdrawal request:

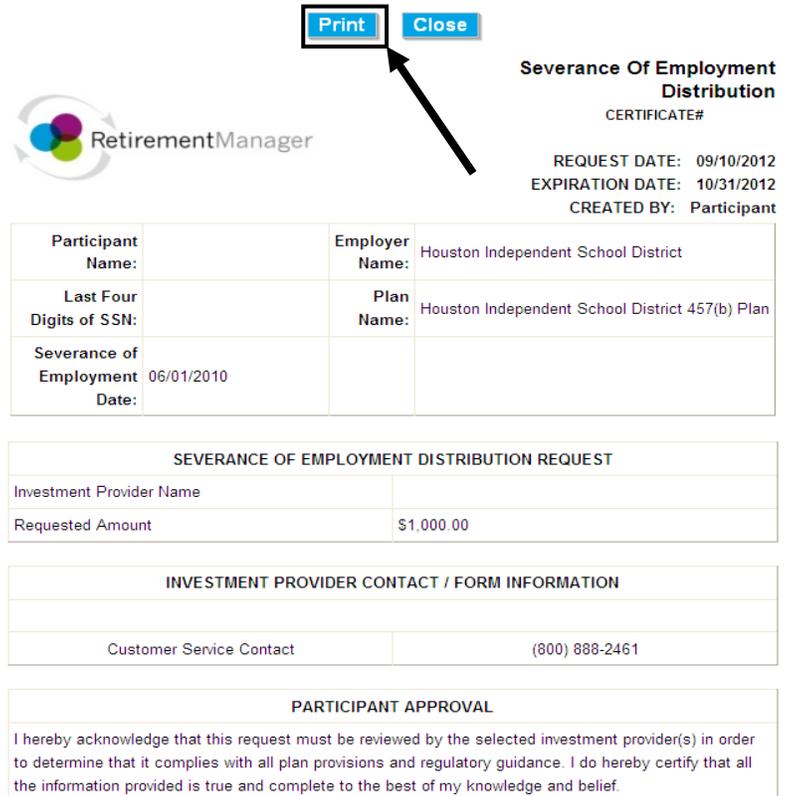
Input the amount for your requested withdrawal. You may also check the box for a full disbursement. If you do not see your investment provider listed, you may manually add your provider following the prompts on the screen. Once you have input your amount for your provider(s), click on "Submit" to proceed.



The screenshot shows the RetirementManager interface for a "Severance of Employment Request". The page title is "Houston Independent School District 403(b) Plan: Severance of Employment Request". Below the title, it says "Select the investment Provider and input the amount of the withdrawal request:". There are fields for "Investment Provider Name", "Account Balance", "As of Date", "Full Disbursement", and "Requested Amount". A question asks "Would you like to add a request from an investment provider not listed above?" with "Yes" selected. Below this is a dropdown for "Investment Provider Name" and a "Requested Amount" input field. There are "ADD REQUEST", "CANCEL", and "SUBMIT" buttons. A black arrow points to the "SUBMIT" button.

### Confirmation/Print Certificate(s):

If your 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 former employer with any questions.



The screenshot shows the "Severance Of Employment Distribution CERTIFICATE#" page. It includes the RetirementManager logo and navigation buttons for "Print" and "Close". The certificate details are as follows:

Participant Name:	Employer Name:	Houston Independent School District
Last Four Digits of SSN:	Plan Name:	Houston Independent School District 457(b) Plan
Severance of Employment Date:	06/01/2010	

Below the certificate details is a table for "SEVERANCE OF EMPLOYMENT DISTRIBUTION REQUEST":

Investment Provider Name	
Requested Amount	\$1,000.00

Next is a table for "INVESTMENT PROVIDER CONTACT / FORM INFORMATION":

Customer Service Contact	(800) 888-2461
--------------------------	----------------

Finally, there is a "PARTICIPANT APPROVAL" section with the following text:

I hereby acknowledge that this request must be reviewed by the selected investment provider(s) in order to determine that it complies with all plan provisions and regulatory guidance. I do hereby certify that all the information provided is true and complete to the best of my knowledge and belief.