

TRANSACTION REQUEST FORM INSTRUCTIONS

- All transaction requests must be submitted to Envoy Plan Services for review and certification on behalf of your Employer.
- A Transaction Request Form must be completed and accompany all transaction requests submitted to Envoy Plan Services.
- The Transaction Request Form is located on the Envoy Plan Services website at www.envoyplanservices.com.
- Transaction requests include:
 - Loans
 - Distributions
 - ◆ Separation from service
 - ◆ Age 59 ½
 - ◆ Required minimum distribution (RMD)
 - Rollovers
 - 403(b) Hardship Withdrawals
 - 457(b) Unforeseen Emergency
 - Contract Exchanges
 - Transfers
 - Qualified Domestic Relations Order (QDRO)
- Transaction Requests can take from 3 to 5 working days to go through the review and certification process. In many circumstances, information must be requested and received from multiple outside entities, i.e. your Employer, any and all of the previous providers you have contributed to. Or, we may need to obtain additional information directly from you.
- All transaction requests should include the Transaction Request Form AND all of the paperwork you have completed for your 403(b) or 457(b) provider. Please do not send only the signature page. We need to see all of the paperwork in order to make a proper evaluation of your request.
- All transaction requests should be sent to:



c/o MidAmerica Administrative & Retirement Solutions
402 South Kentucky Ave., Suite 500
Lakeland, FL 33801

Phone Toll Free (800) 248-8858 • Fax Toll Free (877) 513-2272