Participant Services for 403(b) Legacy Vendors

How to take Withdrawals or Loans from Legacy Vendor Accounts

When a participant is eligible and ready to take a withdrawal or loan from his/her Legacy Vendor 403(b) account at Topeka Public Schools, the following steps should be taken:

1. The participant will request the required withdrawal or loan forms from the 403(b) Legacy Vendor(s) that he/she has established an account.

2. The participant will complete the 403(b) Legacy Vendor's form and send to the following:

   Electronically – forms@retirementplanservice.com

   OR

   Mail/Fax - Benefit Consultants Group, 51 Haddonfield Road Suite 200, Cherry Hill, NJ 08002 OR **Fax to**: 217 541 8370

3. Upon receipt of the participant's withdrawal or loan request, Benefit Consultants Group will review the request and records provided in order to determine if the transaction is allowable.

4. Upon approval, the withdrawal or loan request will be directed back to the Legacy Vendor(s) along with a Certificate of Transaction Approval document to complete the requested transaction.

5. If withdrawal or loan request is denied, written reason will be directed back to the Legacy Vendor that action cannot be completed. A copy of the denied request will be sent to the participant.

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How to Transfer Funds from Legacy Vendor to the Horace Mann Plan

A participant can transfer funds from his/her Legacy Vendor Plan(s) to the Horace Mann plan.
The following steps should be taken:

1. The participant will request the required transfer request form from the Legacy Vendor(s) that he/she has established an account.

2. The participant will need to complete the Horace Mann Retirement Advantage Exchange/Rollover/Transfer In Request Form. **Click here to get the form**.

3. The participant will send both the Legacy Vendor's form and the Horace Mann Form to the following:

Electronically – forms@retirementplanservice.com

OR

Mail/Fax - The Horace Mann Companies, c/o Topeka Public Schools Processing Team

1 Horace Mann Plaza, Springfield IL 62715 OR **Fax to**: 217 541 8370

4. Upon approval, the transfer request will be directed back to the Legacy Vendor(s) along with a Certificate of Transaction Approval document to complete the requested transaction.

5. The Legacy Vendor will need to send the participant's requested dollar amount to the following:

Make checks payable to: Reference on check memo line:	**Matrix Trust Company** TPA 000288, Topeka Public Schools USD 501 403(b) Plan
Mail to (Regular mail):	**Matrix Trust Company** Attn: TPA 000288 P.O. Box 3595 New York, NY 10008
(Overnight Mail Address)	**JPMorgan Chase - Lockbox Processing** Attn: Matrix Trust (DEN) Lockbox 3595 4 Chase Metrotech Center 7th Floor East Brooklyn, NY 11245

Note: *Transfers out of the Horace Mann Plan to the Legacy Vendor Plans are not permitted.*