



# Keep Your Accounts in One Spot

Keeping track of your money can be easier if it's all in one spot. Check out these spot-on reasons why you may want to roll over your former employer's retirement account.

## What's a Rollover?

A rollover means transferring money from one retirement account into another retirement account. For example, you can roll over your retirement account with a previous employer into your Supplemental Retirement Plan account at Parkland. You can also roll over a traditional Individual Retirement Account (IRA).

## Advantages of Rolling Over Your Savings

When you roll over your account, you'll keep earning tax-deferred retirement income and avoid the tax consequences of taking the money as an early distribution. In addition, you can:

- Receive one statement, which makes it easier to track your savings all in one place.
- Develop a cohesive investment strategy so you can monitor your investments better.
- Accurately predict whether you're on track to meet your retirement savings goals.

## Security Tips

Follow these simple tips to safeguard your account information.

- Create a username that's easy for you to remember but difficult for others to guess.
- Change your password on a regular basis.
- Don't use simple words or personal information for your username or password.
- Activate the "Transaction Lock" feature from the Account Security section (found under the Profile icon located at the top right of the screen). You'll get a special code that you'll need to unlock your account when you are ready to withdraw funds.



# How To Roll Over Your Account to the Supplemental Retirement Plan

The rollover process involves two steps.

1. Log in to **MillimanBenefits.com** to create the Rollover Contribution Deposit Form.
2. Contact the prior plan recordkeeper or your IRA custodian to request a rollover.

## STEP 1: CREATE THE ROLLOVER CONTRIBUTION DEPOSIT FORM

- Log in to **MillimanBenefits.com**.
- Click Account Details at the top of each page. Then, select Contributions from the left menu under Account Activity. From there, click “Get started from here” to begin the rollover process.
- Follow the steps to roll over your account. You'll add the estimated amount you're rolling over and decide how to invest your rollover contribution. If you're rolling over Roth after-tax dollars, you'll take some extra steps.
- Verify that everything looks correct and click “Submit” to create the form. Then, print the form, which includes the instructions you'll provide to your prior plan's recordkeeper to get a check.

## STEP 2: REQUEST A ROLLOVER

- Contact your prior plan's recordkeeper or your IRA custodian to request a rollover.
- Request the rollover check be processed with these instructions:
  - Make the check payable to **Parkland Supplemental Retirement Plan, FBO (For Benefit Of) <Your Name>**.
  - List your account number as the last 4 digits of your Social Security number.
  - Provide your address so the check is mailed directly to you.
- Once you receive the check, mail the check and the Rollover Contribution Deposit Form created in Step 1 to the address provided below. This address is also on the form.

Milliman Benefits Processing Center  
c/o Parkland Supplemental Retirement Plan  
P.O. Box 601566  
Dallas, TX 75360-1566

## Access Your Account

- **Website:** Visit **MillimanBenefits.com** (choose English or Spanish). If you have never logged on to the website, click the “New User” button to complete the registration process. You will set up a username and password as well as answer some security questions. After completing the registration process, click the “Log In” button for future logins. If you forget your username or password, click “Login help?” for assistance.
- **Milliman Mobile Benefits app:** Download from the App Store or Google Play.
- **Benefits Service Center:** Call 1.800.995.2608 or use Web Chat on **MillimanBenefits.com**. Representatives are available Monday through Friday from 7 a.m. to 7 p.m. Central time.

## Milliman Has an App For That

Stay up to date with your retirement savings. Download the Milliman Mobile Benefits app from the App Store or Google Play.

