

How to transfer your account



To transfer/roll in your account, log into Account Access at www.icmarc.org, click **Overview**, and then select **Roll in Your Money**.

Have your existing account statement handy for the following information:

- Name of your previous plan provider
- Anticipated account balance you wish to roll in
- Type of account you're rolling in from

Steps to take:

- 1.** Contact your current provider to get their transfer/roll-in form. Complete and sign the form.
- 2.** Complete the NBS 403(b) Exchange Authorization Form or 457(b) Transfer Authorization Form available in Account Access. Complete sections 1, 2, and 5, and then send to NBS for their approval, signature, and return to you.
- 3.** Obtain MissionSquare's Letter of Acceptance (LOA) in Account Access in the **File Vault** under the **Messages and Alerts** menu.

Submit all the documents to your current plan provider. Once submitted and deemed in good order, allow 30 – 60 days for processing.

We're here to help.

Our Roll-in Specialists are here to help you.

We'll let you know when we've received your transferred funds.

We'll send you an email confirmation, and you can verify this information in the **Transaction History** section of Account Access.

For more information, contact your MissionSquare Retirement representative.