

CALIFORNIA STATE UNIVERSITY, FRESNO
Retirement Manager Certification Process and Chancellor's Office Signature

If you have a legacy plan, you can rollover your funds into any of the five Current Fund Sponsors through an In-Service Contract Exchange. An In-Service Contract Exchange will require a certificate to be generated from *Retirement Manager* (see instructions below). The certificate is then attached and submitted to the Legacy plan's forms. The form will not require a signature from the Plan Administrator (Chancellor's Office).

Current Fund Sponsors

- Fidelity
- MetLife
- ING Life and Annuity
- TIAA-Cref
- VALIC

Retirement Manager Certification Instructions

Please access Retirement Manager (website: www.myretirementmanager.com) to initiate and download certificates for in-service contract exchanges, loans and hardship withdrawals, in the following steps:

1. Key in employee unique ID (your SSN #)
2. Create a password (or use the one previously created)
3. Select your campus
4. Key in employee unique ID
5. Key in password
6. Select Disbursement menu
7. Select contract exchange, loan or hardship withdrawal certificate and follow the prompts.
8. Attach the printed certificate to documents required by the fund sponsor or Legacy Vendor (noted above) for handling.

Loan or Hardship Withdrawal

Loans and Hardship Withdrawal request can only be accepted from the Current Fund Sponsors and the Legacy Vendors noted below. A Loan or Hardship Withdrawal will require a certificate to be generated from *Retirement Manager*. The certificate is then attached and submitted to the plan with the plans required forms. The form will not require a signature from the Plan Administrator (Chancellor's Office) as the certificate will take the place of the signature. **Please log on to Retirement Manager as noted above.**

Current Fund Sponsors

- Fidelity - Hardship withdrawals and contract exchanges are available. Currently, Fidelity does not offer loans.
- ING Life and Annuity
- MetLife
- TIAA-Cref
- VALIC

Legacy Vendors (The following vendors utilize retirement manager for loans and hardship withdrawals.)

- Ameriprise Financial
- AXA Equitable
- ING Reliastar
- Great American
- I-A Pacific (Industrial Alliance Pacific Life Insurance)
- Jefferson National
- Legend Group
- Life Insurance Company of the Southwest (LSW)
- Lincoln National
- Midland National
- Oppenheimer Funds
- Security Benefit
- Symetra
- Transamerica

CalPERS Service Credit Purchase, Rollover, or Distribution Requests

The following requests will require a signature from the Chancellor's Office:

- **Active employees:** requesting a CalPERS Service Credit Purchase, Rollover to an IRA or Distribution Request (does not include a Hardship Withdrawal) must obtain a signature from the Chancellor's Office. These requests cannot be processed through Retirement Manager. *See instructions below for obtaining the Chancellor's Office signature.*
- **Retired or Separated Employee:** Employees who have retired or separated from the University are required to obtain a signature from the Chancellor's Office for Contract Exchange to CSU Approved Fund, Distribution Request, or Rollover to IRA pursuant to the CSU TSA 403[b] plan document and IRS guidelines. Retirees are not eligible for loans or hardship withdrawals. Please specify the date of your retirement or separation on your document. *See instructions below for obtaining the Chancellor's Office signature.*

Please mail the forms to the Chancellor's Office for signature. This process may take up to 10 business days for a signature. Forms must be sent with a self-addressed, stamped envelope to the following address:

Chancellor's Office, The California State University
401 Golden Shore, 4th Floor - Attention: Donelle George
Long Beach, CA 90802

If you have any questions, please contact Human Resources at (559) 278-2032.