

## SUMMARY

LSU 403(b) participants who want to request a distribution from their 403(b) account after retirement or separation from employment can obtain an employee withdrawal certificate, which serves as an approval for severance of employment distributions. These instructions will guide you through setting up an account with Retirement Manager and generating the approval certificate to submit to your 403(b) provider. This certificate is the sole plan/employer authorization required for your provider to process your distribution request.

## ACCOUNT SETUP

Go to the **Retirement Manager website** at [www.myretirementmanager.com](http://www.myretirementmanager.com).

1. On the Retirement Manager website, click **Login** in the top right corner. Under Participants, click **Login**.
2. On the Sign In screen, click “**First Time User? Get Started**” located under the Sign In button.
3. If prompted to verify your employer, use the search box to type “**LSU**” and select your LSU campus from the list. Click **Next**.
4. Fill in your personal information.
  - a. Enter **Last Name**.
  - b. Enter **Birthdate**.
  - c. Enter **Social Security Number**.
5. Click **Continue**.
6. You will then be prompted to **Create Profile**.
  - a. Enter your preferred **Username**.
  - b. Enter your **Email Address**.
  - c. Enter your **Email Address** again to confirm.
  - d. Create a **Password**. *Please note the site’s password requirements (At least 8 characters long, at least one upper and lower case letter, symbol, and number. No spaces and no more than 3 consecutive characters)*
  - e. Enter your **Password** again to confirm.
  - f. Click **Continue** (or cancel if you do not wish to proceed).
7. Verify your **Email Address**.
  - a. A code will be sent to the email address you provided to enter the site. *Note: if you do not receive an email, check your Junk and/or Spam folder(s). You can also click “Resend Email” to have another code sent.*
8. Once your email address is verified, you will be prompted to enter your **Phone Number** as part of their security and recovery process.
  - a. Check the box next to “**Text me an authentication code**” and click **Continue**.
  - b. Enter the **code** that was received and click **Submit**.
9. You will then be prompted to review the **Terms of Use**. Once reviewed, click “**I Agree**” to proceed.

## Obtaining an Employee Withdrawal Certificate

From the **Retirement Manager homepage**:

1. Select "**Request a withdrawal**" from the drop down menu.
2. Select "**Board of Supervisors LSU and A&M College 403b Plan**" button.
3. The "**Severance of Employment**" button should be selected. Click **Next**.
4. Click **Full Disbursement** if you are withdrawing or rolling over the entire account balance. Otherwise, enter the exact **Distribution Amount (as it appears on your vendor paperwork)**.
5. Check the "**I agree**" box.
6. Click **Submit**.
7. On the confirmation screen, click "**Print/Download certificate.**"
8. Save as a PDF or print your certificate.
9. Submit the certificate along with your withdrawal/rollover paperwork to your 403(b) provider. No plan administrator/employer signatures are required on provider forms.