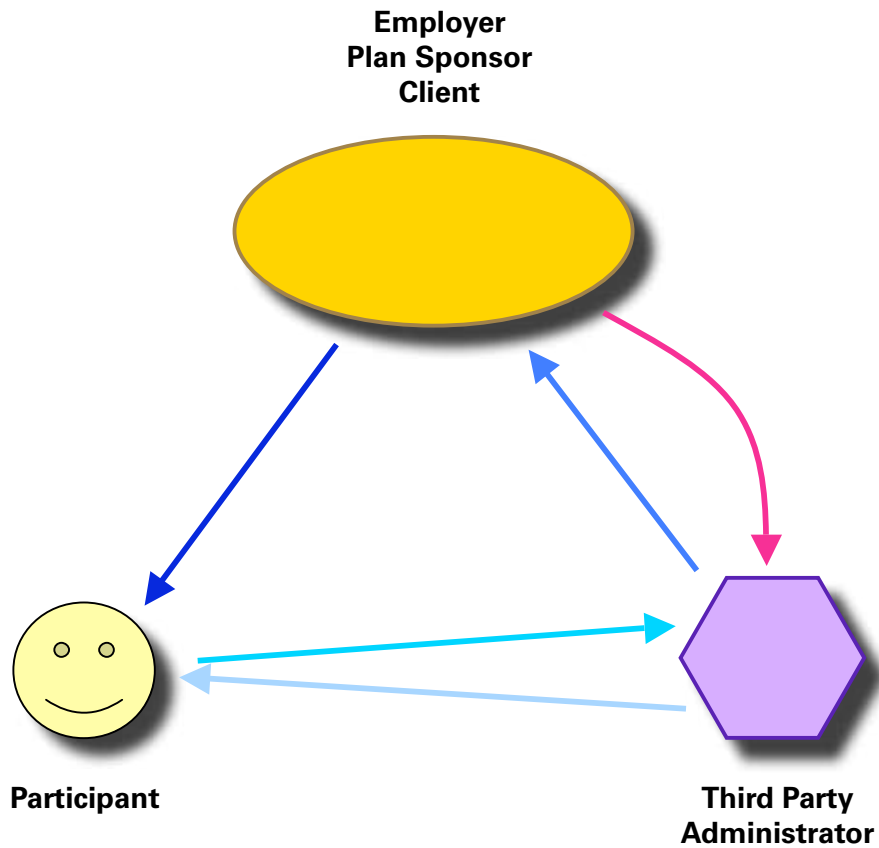


## Distribution Process for Defined Benefit and Self-Trusteed Plans



- Step 1: Client notifies Third Party Administrator that Employee has terminated  
*Please note: the next steps do not start until all contribution and benefit issues have been finalized for this employee. For some plans the next steps may start right away, for others, the next steps will not start until the completion of the annual valuation.*
- Step 2: Election forms sent to Participant
- Step 3: Participant signs forms returns to Third Party Administrator
- Step 4: Third Party Administrator prepares distribution directive and sends to Employer
- Step 5: Trustee prepares check and forwards to Participant