Direct Solutions®

USI® CONSULTING GROUP

Accessing Plan Forms Online

1. From the **usicg.com** home page, click the *Retirement Account Access* link on the right hand side of the screen.
2. Click the *View Plan Forms* link, which is the second link under the Participant Account Services menu on the right hand side of the screen.
3. The next screen will show **Forms** listed in the middle of the screen and you can choose the type of form you need as explained below:

Distribution Forms

I. If you select *Distribution Forms*, you will have two options to choose from: is your home address in the U.S. or not in the U.S.?

II. If your home address is <u>in</u> the U.S., select *Click here* under this option. [If not a U.S. address select that option and you will get a screen to complete the required W-8BEN form and then you may continue following the steps below].

III. Read Important Information Regarding Your Payment then click *Continue*.

IV. Read the Tax Notice and check the box to acknowledge you have read this Notice (you can also print it for your records from this screen). Then choose the *Click here* button beneath the acknowledgement to continue and access the forms for your plan.

V. Enter your Plan ID# and the 1st three alpha characters of your plan name (codes can be found on your quarterly statement) then click *Submit*.

VI. Scroll down and in the middle of the screen you will see a heading entitled ***FORMS*** with your plan's distribution forms listed below it. Click on the name of the form(s) you want to view and print.

Administrative Forms

I. If you select *Administrative Forms*, you will be immediately brought to a screen where you must enter your Plan ID# and the 1st three alpha characters of your plan name (codes can be found on your quarterly statement). Click *Submit*.

II. Scroll down and in the middle of the screen you will see a heading entitled ***FORMS*** with your plan's administrative forms listed below it. Click on the name of the form(s) you want to view and print.