

Pensions Made Easy®

Request your distribution online.

1 Log in:

Go to www.pensionsmadeeasy.com. Click on “Participant (P-PAW) Login” in the gray box toward the bottom of the page which will then take you to the Participant Login screen as seen to the right. You will click on *New User Sign-Up* if you have not used this system before. If you have used it, you will enter your User Name and Password click **Login**.

2 New User - Create your Username and Password

Provide the indicated information and create a user name and password.

3 Start Wizard

Click **Start Wizard** on the next page to enter the system. Choose the plan you wish to request the distribution from and enter or confirm your personal information.

4 Tax Notice

Print and/or read the tax notice. Scroll to the bottom and check the box acknowledging receipt of the notice and click **I Accept**.

5 Select activity

Select the activity you are requesting and answer the subsequent questions related to that activity.

The screenshot shows the 'Activity Wizard' interface for 'John Participant'. It is on 'STEP 3' and asks the user to 'Please select only one activity type:'. The options are: Termination of Employment (Discontinued, Quit, Fired, Resigned, Retired or Plan Termination), In Service, and Loan. A note on the right says 'Please note that you may click any of the red fields to change the related information.' Below the note, it lists: Plan: ABC Company 401(k) Plan, Participant: John Participant, and a red field for 'Participant: John Participant'. At the bottom, there are '<< Back' and 'Next >>' buttons and a 'Wizard Progress' bar.

6 Select your desired payment method

Indicate how you would like your distribution paid out. Complete the information as requested on all screens that appear next.

The screenshot shows the 'Activity Wizard' interface for 'John Participant' on 'STEP 4'. It asks 'How do you wish to receive your vested benefit:'. The options are: Rollover, Combination, and Lump Sum. A note on the right says 'Please note that you may click any of the underlined red fields to change the related information.' Below the note, it lists: Plan: ABC Company 401(k) Plan, Participant: John Participant, Activity Type: Termination of Employment, and a red field for 'Date: 11/01/2014'. At the bottom, there are '<< Back' and 'Next >>' buttons and a 'Wizard Progress' bar.

7 Review your information

After completing all required screens, review the information you have entered and click **Submit**.

The screenshot shows the 'Review Choices' screen in the 'Activity Wizard' for 'John Participant'. It displays a summary of the information entered:
- Personal Info: SSN: 123-45-6789, First Name: John, Last Name: Participant, DOB: 01/01/1965, Activity Type: Termination of Employment, Last Day Worked: 11/01/2014, Plan: ABC Company 401(k) Plan.
- Participant Address: Address: 123 Abc Street, City: Troy, State: NY, Zip Code: 12124, E-Mail: john@dpstpa.com.
- Lump Sum Information: Method: Check, Fed Check To: 123 Abc Street, Troy, NY 12124, Federal Tax Withheld: 20%.
A note at the bottom states: 'Please note: Your final account balance will be reduced by \$65 to cover administrative fees.' At the bottom, there are '<< Back' and 'Submit >>' buttons and a 'Wizard Progress' bar.

8 Confirmation

Print or write down the confirmation number you receive (P-PAWXXXX-XXX). A confirmation will also be emailed to you at the email address you have supplied through this process.

The screenshot shows the 'Confirmation' screen in the 'Activity Wizard' for 'John Participant'. It says 'Thank You. You have successfully submitted an activity through the DPS Participant Activity Wizard. A confirmation e-mail has been sent to john@dpstpa.com. Your confirmation number is: P-PAW13056-5114'. There is a 'Printer Friendly Version' button and a note: 'If you have any questions please feel free to contact DP's at dpsinfo@dpstpa.com'. At the bottom, there is an 'Exit the Activity Wizard' button and a 'Wizard Progress' bar.

Congratulations – your distribution request will now be processed through our office.

If you have any questions feel free to call us at (937) 434-4488 or email us at dpsinfo@dpstpa.com. Thank you.