



# City of Richmond, Virginia

*RICHMOND RETIREMENT SYSTEM*

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## **STEP-BY-STEP DIRECTIONS FOR SETTING UP YOUR RETIREMENT ACCOUNT(S) AT WWW.ICMARC.ORG**

New and rehired employees with the City of Richmond are responsible for the allocation of their Defined Contribution 401(a) and Defined Compensation 457 Plan account funds, and the designation of their beneficiary(ies).

These programs are administered by ICMA Retirement Corporation (ICMA-RC), available online at [www.icmarc.org](http://www.icmarc.org).

### **STEP-BY-STEP DIRECTIONS FOR ENROLLEMENT**

Once the Richmond Retirement System has enrolled you in the Defined Contribution 401(a) plan and/or you elect to enroll in the 457 Plan, ICMA-RC will mail you a welcome letter.

Upon receipt of the letter or after receipt of your second pay check, please call 1-800-669-7400 or click login on [www.icmarc.org](http://www.icmarc.org) to complete the enrollment process and provide the following information to finalize your enrollment.

#### **1. BENEFICIARY DESIGNATION**

Your designation of beneficiary(ies) tells ICMA-RC who should receive the accumulated value of your account if you die before distribution of your account. To designate your beneficiary(ies) with ICMA, log in to the website at [www.icmarc.org](http://www.icmarc.org).

Once you have entered your User ID, under *Manage My Account* at the top of the screen, click *Personal Information*. Select the *401* and/or *457* option from the *Plan Selection* drop down box. Next, click *Beneficiaries*. For each beneficiary, enter name, birth date, SSN, relationship and percentage, and select *Primary* or *Contingent*. Click *Proceed*, and write down the confirmation number for your reference.

#### **2. ALLOCATION OF FUTURE CONTRIBUTIONS**

You can change your 401(a) or 457 account's default investment allocation if you choose, but it is not required. To change your investment elections with ICMA, log in to the website at [www.icmarg.org](http://www.icmarg.org).

Once you have entered your User ID, under *Manage My Accounts* at the top of the screen, click on *Future Allocations*. Select the *401* and/or *457* option from the *Plan Selection* drop down box. Next, select the funds that you would like to change, and enter the allocation percentage(s). Click *Proceed*, and write down the confirmation number for your reference.

*NOTE: ICMA-RC can provide you with information to help you decide how to invest your contributions.*

### **ASSISTANCE WITH YOUR ACCOUNT**

You can call Investor Services at 1-800-669-7400, manage your account information online at [www.icmarg.org](http://www.icmarg.org) (after you set up your User ID and password in Account Access), or contact your local ICMA-RC Retirement Plan Specialist, Vernon Stockton at 1-888-803-2723.

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#### **Richmond Retirement System**

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<http://www.richmondgov.com/retirement/>