The Information You Want When You Need It

Interactive Voice Response (IVR) System 1-866-547-8809

What is the Interactive Voice Response (IVR) System?

A toll-free telephone system that connects you to your account information anytime – 24 hours a day, 7 days a week, 365 days a year.

Why use the IVR?

We personalize the system to include only your plan's investment options and features.

By calling 1-866-547-8809 you can:

- Review account balances by fund and contribution type
- Obtain recent account activity history
- Obtain fund pricing
- Obtain fund performance
- Set/change contribution elections*
- Set/change deferral options*
- Reallocate your account balance*
- Transfer amounts between funds*
- Determine amount available for a loan*
- Model loan scenarios/request a loan*
- Determine amount available for a hardship withdrawal*
- Request a distribution*
- Request Spanish language option*

*If applicable

By pressing "0", you can opt-out* at any time Monday - Friday between 8:00AM - 7:30PM EST to speak with a Service Representative.

Before you call

In order to start using the IVR, you'll need to establish a Personal Identification Number (PIN). The first time you call, simply follow the instructions to establish a PIN.

Due to plan restrictions, some options may not be available.

This service is only available on a touch-tone phone.

Please speak with your company's Plan Administrator for assistance or option availability.

Transfer requests received by 4:00 p.m. Eastern will be processed at that day's closing price.

Transfers requested after 4:00 p.m. Eastern will be processed on the next business day's closing price.

How do I use the IVR?

Press 1: General Information/Personalize PIN
- Hear detailed descriptions about the options available through the Interactive Voice Response (IVR) system
- Personalize your Personal Identification Number (PIN)

Press 2: Account Balance Options
- Obtain Account Balance by Fund
- Obtain Account Balance by Contribution Type
- Obtain Fund Pricing
- Obtain Amount Available for Hardship Withdrawal *
- Request an Account Balance Statement *
- Obtain Plan Investment Performance
- Obtain Recent Account Activity History

Press 3: Contribution Options
- Review Current Contribution Investment Elections
- Set/Change Contribution Investment Elections
- Obtain Deferral Options *
- Obtain List of Funds with Redemption Fee and/or Blocking Criteria *

Press 4: Balance Exchange Options
- Reallocate Your Account Balance *
- Transfer a Specified Percent from One Investment to Another Investment *
- Obtain List of Funds with Redemption Fee and/or Blocking Criteria *

Press 5: Loan Information*
- Obtain the Maximum Loan Amount Available *
- Model a Sample Loan *
- Request a Loan Paperwork Package *
- Submit Loan Request *

Press 8: Return to Main Menu

Press 9: End Your Call

Press 0: Speak to a Service Representative*
(Monday - Friday 8:00AM - 7:30PM EST)

*if applicable