Instructions for Fund Transfers

Managing Your Investments

Information Regarding Fund Transfers

Please be advised of the following:

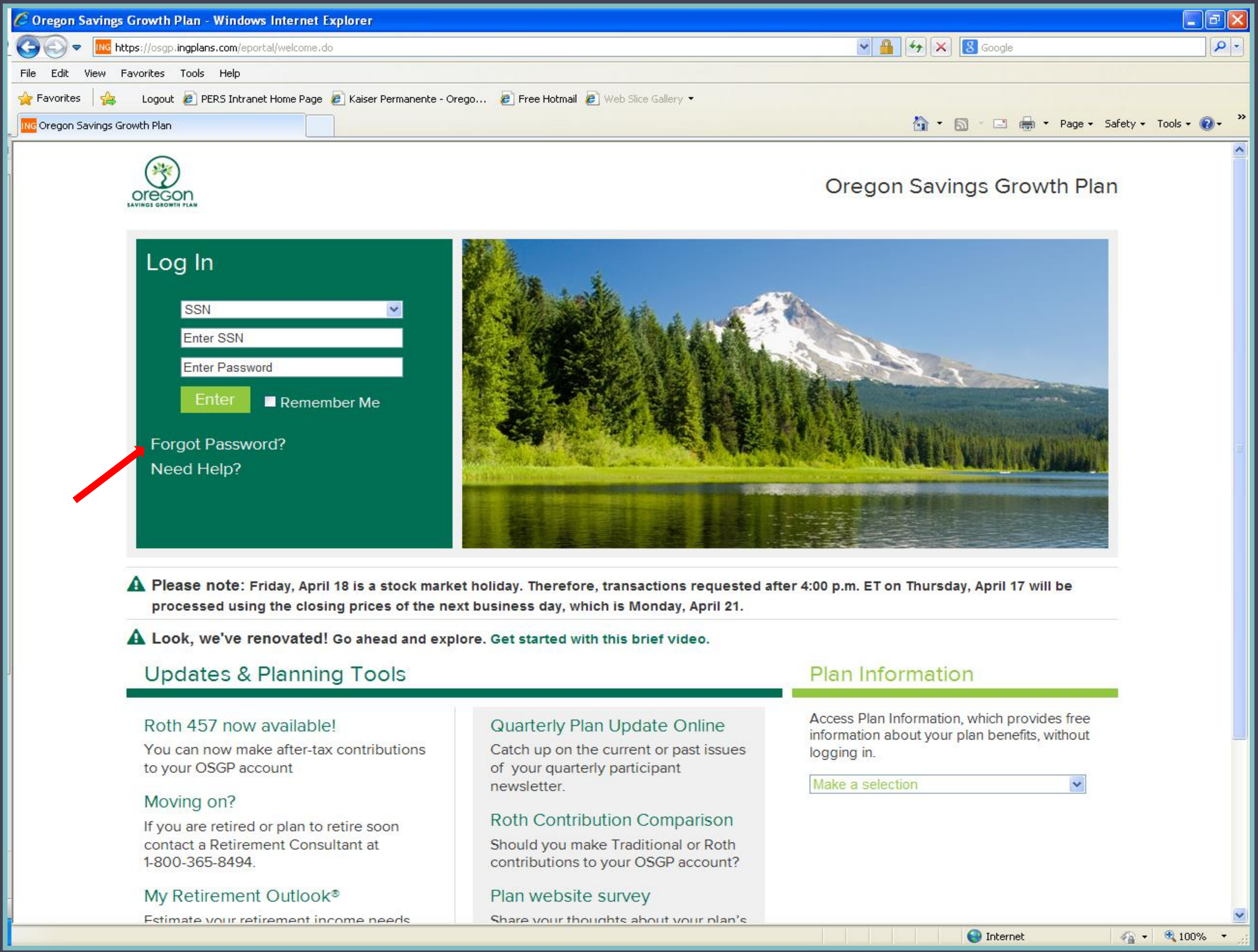
- There are trading restrictions: No single transfer transaction may exceed $100,000 in one account. If you want to transfer funds that exceed the restricted amount you will need to do so over more than one day. If you have funds in the Stable Value fund, please note that you cannot transfer directly to the short term fixed or self-directed brokerage account. You would have to transfer to another fund for 90 days and then transfer to either one of those funds.
- A purchase that is attributable to the International Stock Option may not be redeemed for a period of 30 days following the date of the trade.
- Transfers may only be made in dollar amounts, not percentages.
- Market fluctuation may dictate that there are residual amount left in the funds you are transferring from – If you would like these residual amounts transferred out, please call 1-800-365-8494.

Online Access to Your OSGP Account

Use this link to log into your OSGP account: https://osgp.voyaplans.com/eportal/welcome.do

For assistance logging into your online account, please call 1-800-365-8494 and our customer service representatives will be happy to assist you, or go to https://osgp.voyaplans.com/eportal/welcome.do and click, "Forgot Password," then simply follow the prompts.

Example on next page…….


Oregon Savings Growth Plan - Windows Internet Explorer
https://osgp.ingplans.com/eportal/welcome.do
File Edit View Favorites Tools Help
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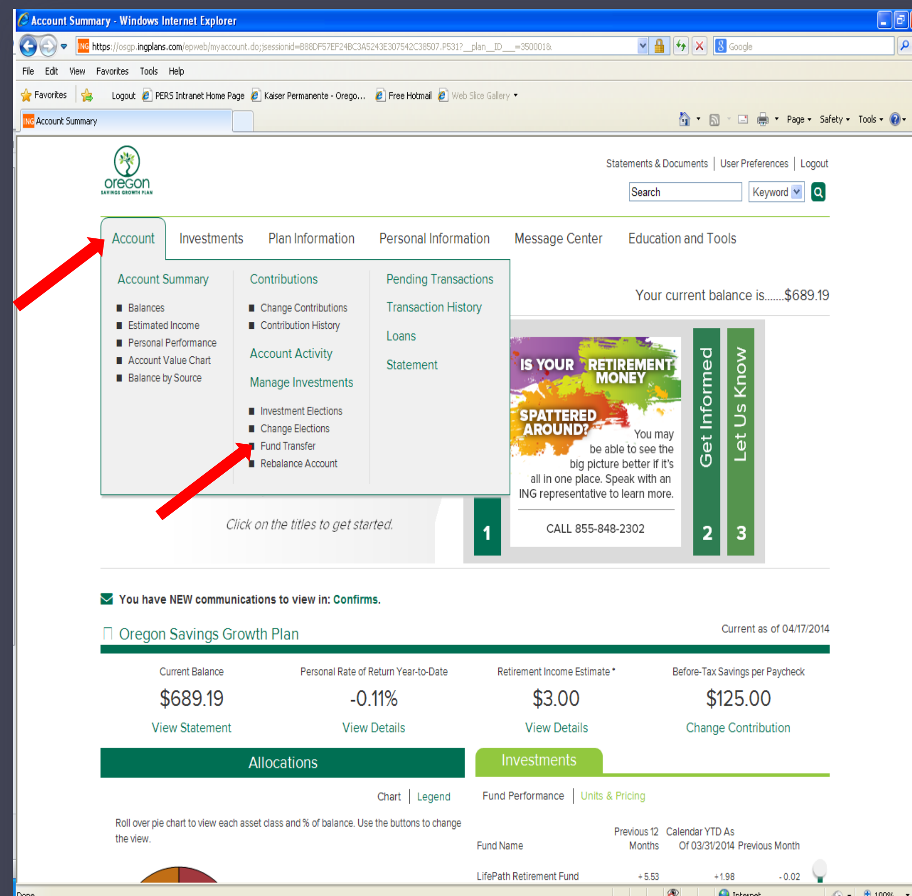
Logout
PERS Intranet Home Page
Kaiser Permanente - Orego...
Free Hotmail
Web Slice Gallery
Oregon Savings Growth Plan
Page Safety Tools
oregon
SAVINGS GROWTH PLAN
Oregon Savings Growth Plan
Log In
SSN
Enter SSN
Enter Password
Enter
Remember Me
Forgot Password?
Need Help?
Please note: Friday, April 18 is a stock market holiday. Therefore, transactions requested after 4:00 p.m. ET on Thursday, April 17 will be processed using the closing prices of the next business day, which is Monday, April 21.
Look, we've renovated! Go ahead and explore. Get started with this brief video.
Updates & Planning Tools
Roth 457 now available!
You can now make after-tax contributions to your OSGP account
Moving on?
If you are retired or plan to retire soon contact a Retirement Consultant at 1-800-365-8494.
My Retirement Outlook®
Quarterly Plan Update Online
Catch up on the current or past issues of your quarterly participant newsletter.
Roth Contribution Comparison
Should you make Traditional or Roth contributions to your OSGP account?
Plan website survey
Plan Information
Access Plan Information, which provides free information about your plan benefits, without logging in.
Make a selection
Internet
100%

Account Home Page

- Click the Account Tab at the top of your home page.
- Then click, “Fund Transfer.”

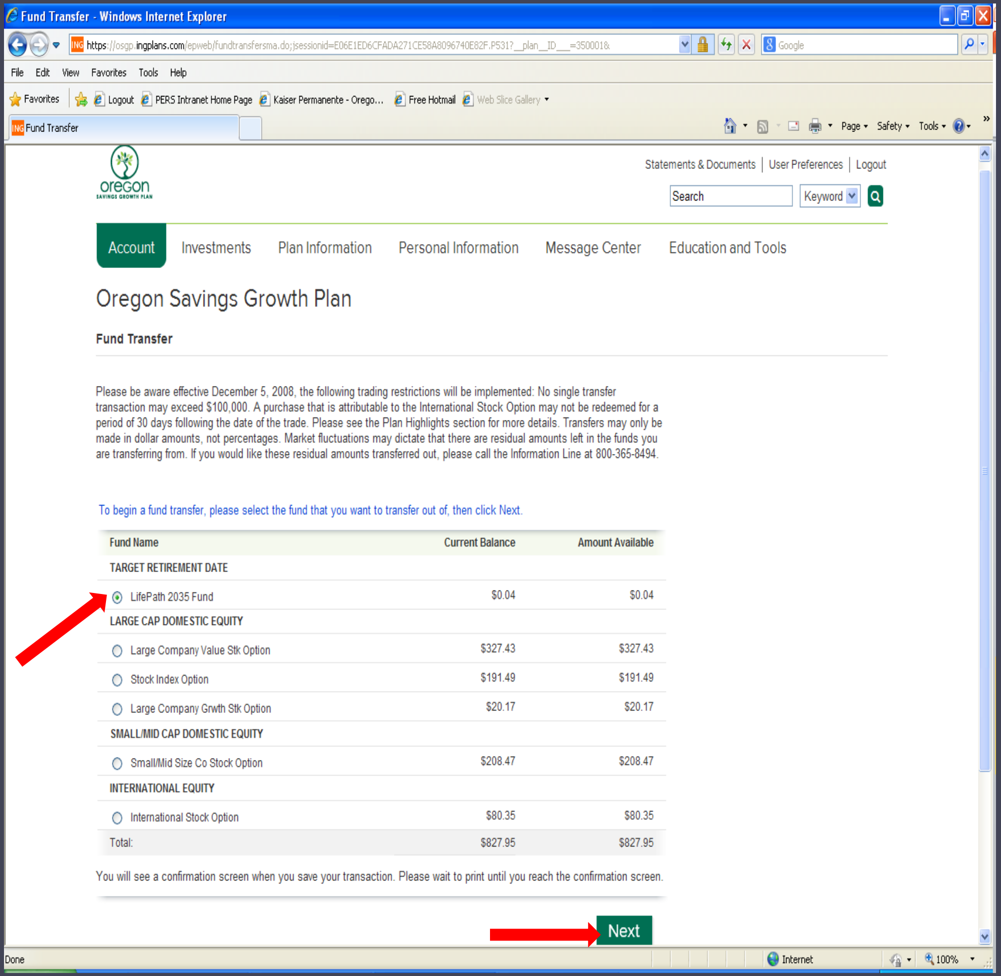
This will take you to the Fund Transfer forum.



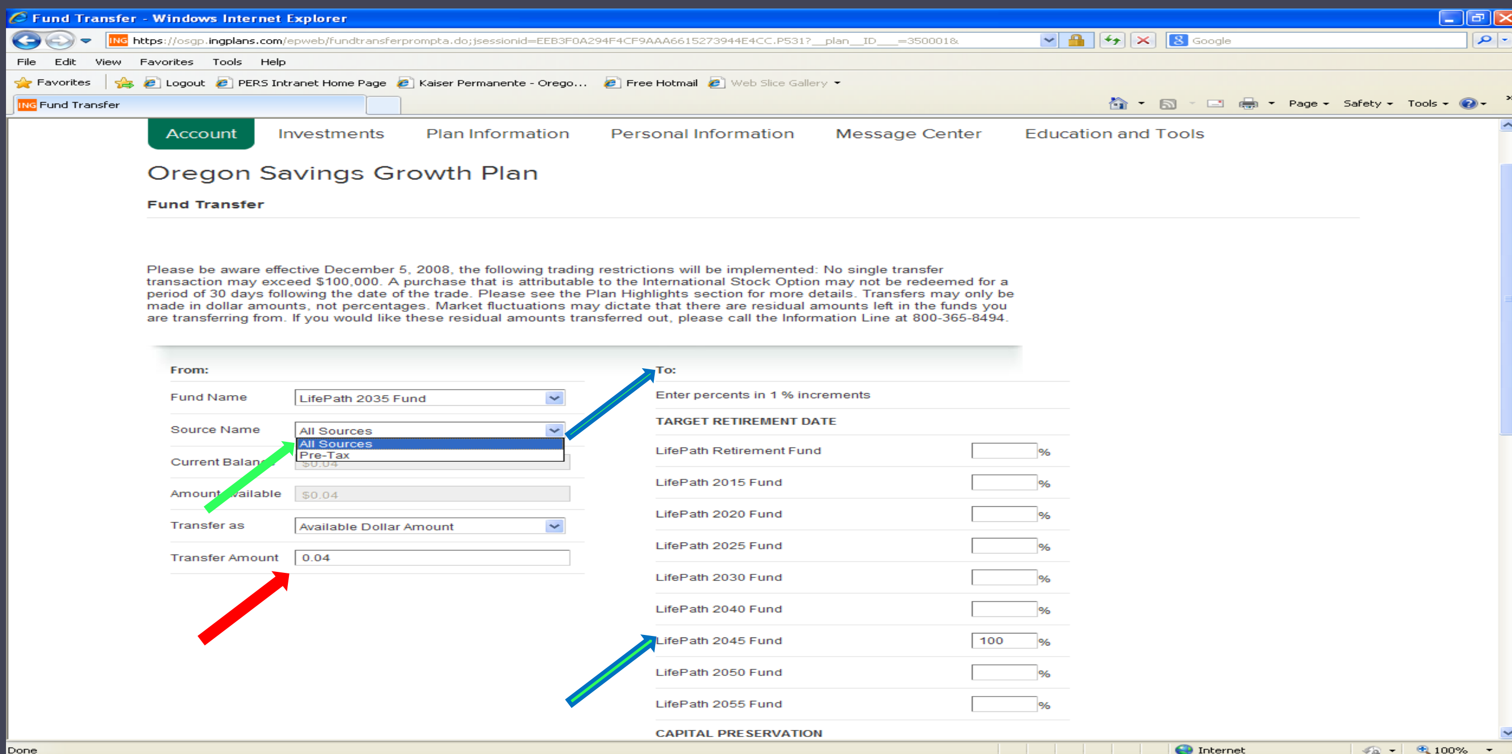
Fund Transfer

This is your Fund Transfer forum.

- Select the fund you want to transfer funds from.
- Click, “Next”

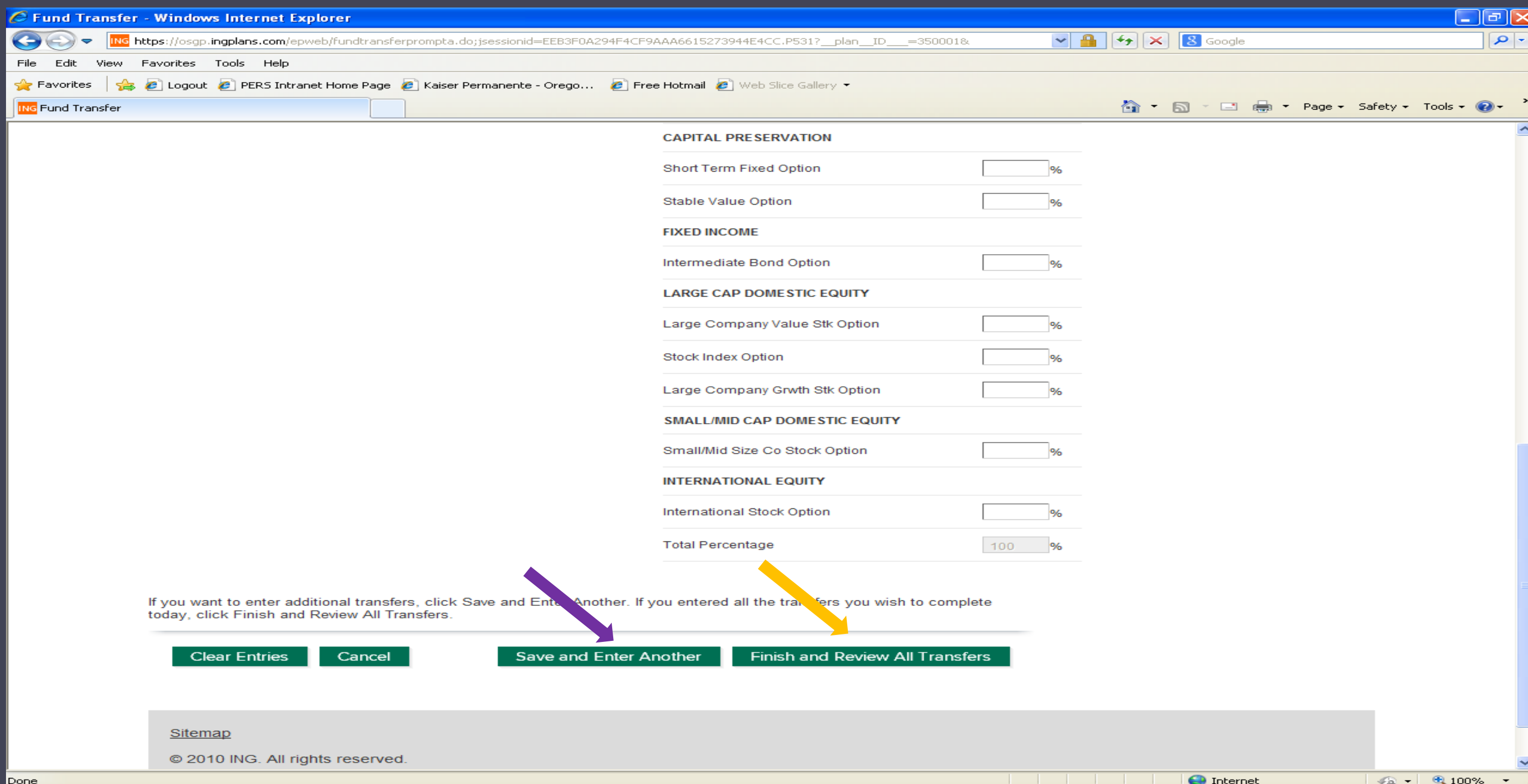


Fund Transfer



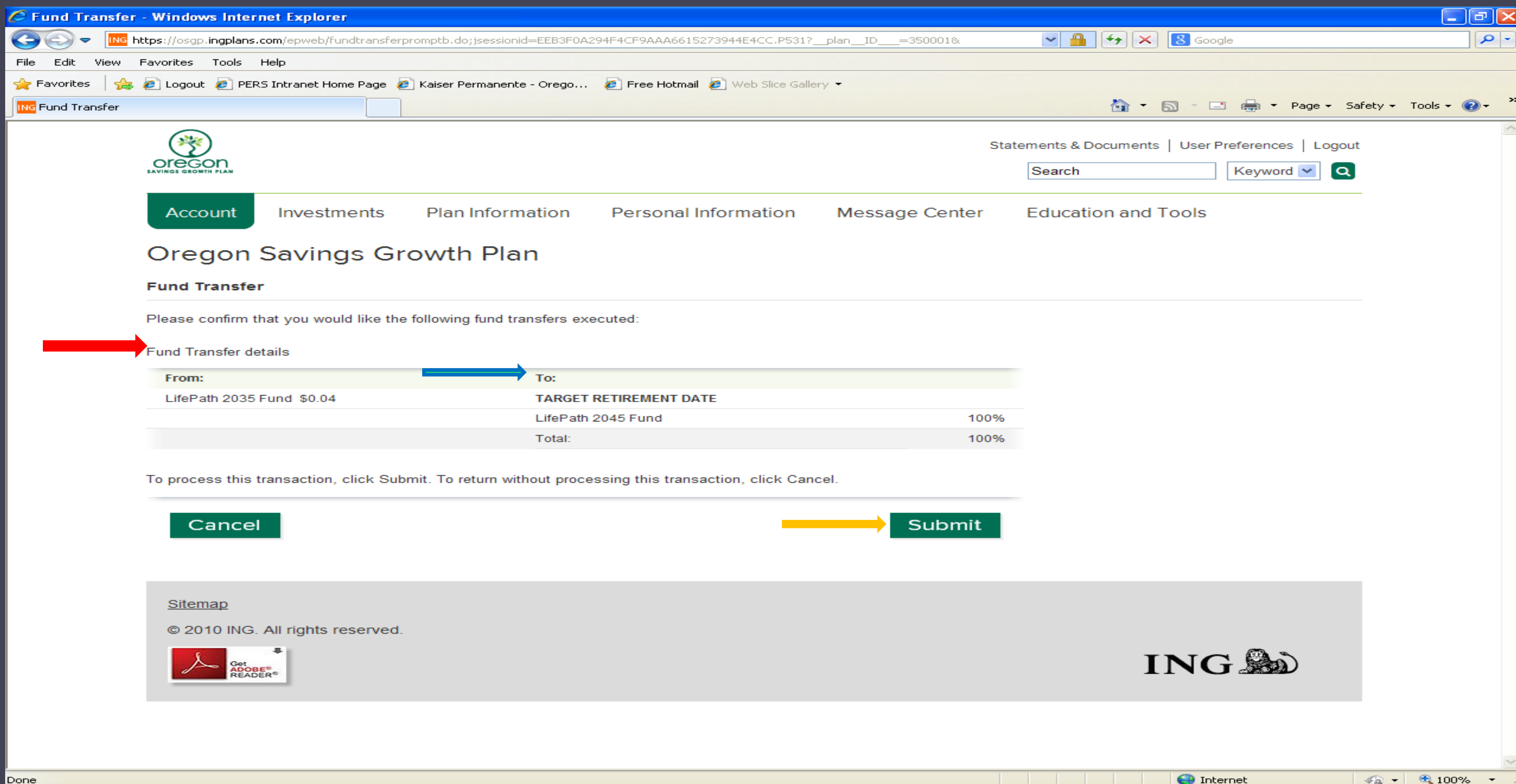
- You can select to transfer all your dollars or by dollar source (pre-tax or Roth after-tax). This example does not reflect the Roth after-tax option, as this would only be an option if the you have deferred Roth dollars;
- Enter the amount you want to transfer; and
- Enter the percentage of the transfer under the “To:” column.

Fund Transfer



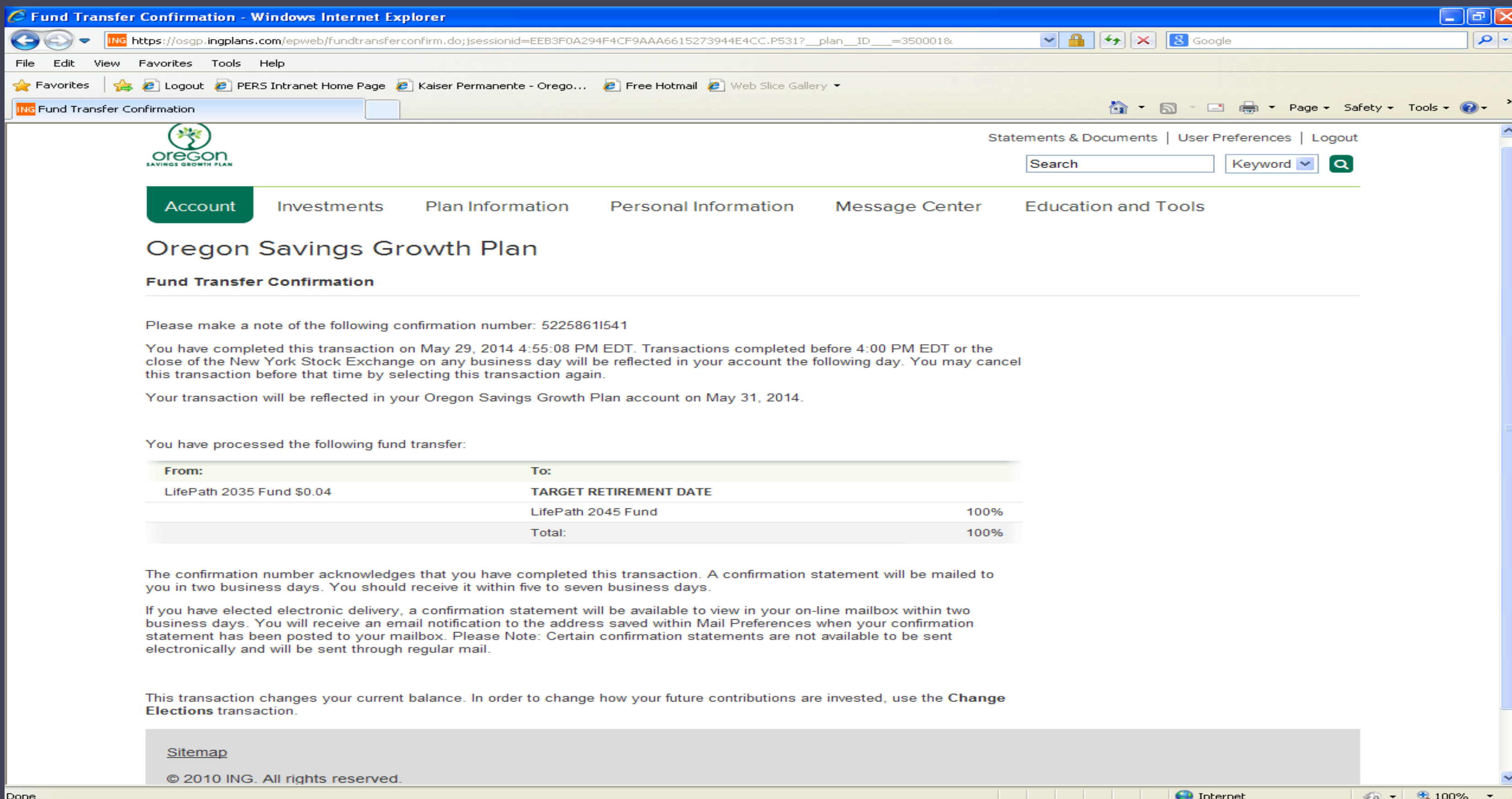
- If you want to enter additional transfers, click “Save and Enter Another.”
- If you have entered all your transactions, click “Finish and Review All Transfers.”

Fund Transfer



This page gives you an opportunity to review your transaction prior to submission. If you are satisfied with the transaction, click “Submit.”

Finalize Your Transfer



Once you have submitted your transfer, you will receive a confirmation.