

# 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

### Log In

SSN

Enter SSN

Enter Password

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®

Estimate your retirement income needs

#### 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

Share your thoughts about your plan's

### Plan Information

Access Plan Information, which provides free information about your plan benefits, without logging in.

# 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.

The screenshot displays the 'Account Summary' page for the Oregon Savings Growth Plan. The navigation menu at the top includes 'Account', 'Investments', 'Plan Information', 'Personal Information', 'Message Center', and 'Education and Tools'. The 'Account' tab is selected and highlighted with a red arrow. Under the 'Account' tab, there are several sub-sections: 'Account Summary' (with links for Balances, Estimated Income, Personal Performance, Account Value Chart, and Balance by Source), 'Contributions' (with links for Change Contributions and Contribution History), 'Account Activity' (with links for Manage Investments, Investment Elections, Change Elections, Fund Transfer, and Rebalance Account), 'Pending Transactions', 'Transaction History', 'Loans', and 'Statement'. The 'Fund Transfer' link under 'Account Activity' is highlighted with a red arrow. The page also shows a current balance of \$689.19 and a retirement income estimate of \$3.00. A table below the account summary provides details for the Oregon Savings Growth Plan, including the current balance, personal rate of return, retirement income estimate, and before-tax savings per paycheck. The table is as of 04/17/2014.

Current Balance	Personal Rate of Return Year-to-Date	Retirement Income Estimate *	Before-Tax Savings per Paycheck
\$689.19	-0.11%	\$3.00	\$125.00
<a href="#">View Statement</a>	<a href="#">View Details</a>	<a href="#">View Details</a>	<a href="#">Change Contribution</a>

Current as of 04/17/2014

Allocations | Investments

Chart | Legend | Fund Performance | Units & Pricing

Roll over pie chart to view each asset class and % of balance. Use the buttons to change the view.

Previous 12 Months | Calendar YTD As of 03/31/2014 | Previous Month

Fund Name: LifePath Retirement Fund

Performance: +5.53 | -1.98 | -0.02

# Fund Transfer

This is your Fund Transfer forum.

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

Fund Transfer - Windows Internet Explorer

https://osgp.inplans.com/epweb/fundtransfersma.do?sessionId=ED6E1ED6CFADA271CE38A8096740E82F.P5317\_\_plan\_ID\_\_\_=350001&

File Edit View Favorites Tools Help

Logout PERS Intranet Home Page Kaiser Permanente - Orego... Free Hotmail Web Slice Gallery

Fund Transfer

Statements & Documents | User Preferences | Logout

Search Keyword

Account Investments Plan Information Personal Information Message Center Education and Tools

## Oregon Savings Growth Plan

### Fund Transfer

Please be aware effective December 5, 2008, the following trading restrictions will be implemented: No single transfer transaction may exceed \$100,000. 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. Please see the Plan Highlights section for more details. Transfers may only be made in dollar amounts, not percentages. Market fluctuations may dictate that there are residual amounts left in the funds you are transferring from. If you would like these residual amounts transferred out, please call the Information Line at 800-365-8494.

To begin a fund transfer, please select the fund that you want to transfer out of, then click Next.

Fund Name	Current Balance	Amount Available
<b>TARGET RETIREMENT DATE</b>		
<input checked="" type="radio"/> LifePath 2035 Fund	\$0.04	\$0.04
<b>LARGE CAP DOMESTIC EQUITY</b>		
<input type="radio"/> Large Company Value Stk Option	\$327.43	\$327.43
<input type="radio"/> Stock Index Option	\$191.49	\$191.49
<input type="radio"/> Large Company Grwth Stk Option	\$20.17	\$20.17
<b>SMALL/MID CAP DOMESTIC EQUITY</b>		
<input type="radio"/> Small/Mid Size Co Stock Option	\$208.47	\$208.47
<b>INTERNATIONAL EQUITY</b>		
<input type="radio"/> International Stock Option	\$80.35	\$80.35
Total:	\$827.95	\$827.95

You will see a confirmation screen when you save your transaction. Please wait to print until you reach the confirmation screen.

Next

# Fund Transfer

From:

Fund Name: LifePath 2035 Fund

Source Name: All Sources

Current Balance: \$0.04

Amount Available: \$0.04

Transfer as: Available Dollar Amount

Transfer Amount: 0.04

To:

Enter percents in 1 % increments

TARGET RETIREMENT DATE

LifePath Retirement Fund	<input type="text"/>
LifePath 2015 Fund	<input type="text"/>
LifePath 2020 Fund	<input type="text"/>
LifePath 2025 Fund	<input type="text"/>
LifePath 2030 Fund	<input type="text"/>
LifePath 2040 Fund	<input type="text"/>
LifePath 2045 Fund	<input type="text" value="100"/>
LifePath 2050 Fund	<input type="text"/>
LifePath 2055 Fund	<input type="text"/>

CAPITAL PRESERVATION

- ❑ 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 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

The screenshot displays the 'Fund Transfer' web application. The page is organized into several sections, each with a list of investment options and a corresponding percentage input field:

- CAPITAL PRESERVATION**
  - Short Term Fixed Option:  %
  - Stable Value Option:  %
- FIXED INCOME**
  - Intermediate Bond Option:  %
- LARGE CAP DOMESTIC EQUITY**
  - Large Company Value Stk Option:  %
  - Stock Index Option:  %
  - Large Company Grwth Stk Option:  %
- SMALL/MID CAP DOMESTIC EQUITY**
  - Small/Mid Size Co Stock Option:  %
- INTERNATIONAL EQUITY**
  - International Stock Option:  %
- Total Percentage**:  100 %

At the bottom of the form, there is a row of four buttons: 'Clear Entries', 'Cancel', 'Save and Enter Another', and 'Finish and Review All Transfers'. A purple arrow points to the 'Save and Enter Another' button, and a yellow arrow points to the 'Finish and Review All Transfers' button. Below the buttons, there is a 'Sitemap' link and a copyright notice: '© 2010 ING. All rights reserved.'

- ❑ 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

**Account** | Investments | Plan Information | Personal Information | Message Center | Education and Tools

## Oregon Savings Growth Plan

### Fund Transfer

Please confirm that you would like the following fund transfers executed:

**Fund Transfer details**

From:	To:
LifePath 2035 Fund \$0.04	TARGET RETIREMENT DATE
	LifePath 2045 Fund 100%
	Total: 100%

To process this transaction, click Submit. To return without processing this transaction, click Cancel.

**Cancel** **Submit**

Sitemap  
© 2010 ING. All rights reserved.  
ING

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

The screenshot shows a web browser window titled "Fund Transfer Confirmation - Windows Internet Explorer". The address bar displays the URL: [https://osgp.ingplans.com/epweb/fundtransferconfirm.do;jsessionid=EEB3F0A294F4CF9AAA6615273944E4CC.P531?\\_\\_plan\\_\\_ID\\_\\_=350001&](https://osgp.ingplans.com/epweb/fundtransferconfirm.do;jsessionid=EEB3F0A294F4CF9AAA6615273944E4CC.P531?__plan__ID__=350001&). The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page content features the Oregon Savings Growth Plan logo and navigation links: Account, Investments, Plan Information, Personal Information, Message Center, and Education and Tools. A search bar and "Logout" link are also visible. The main heading is "Oregon Savings Growth Plan" followed by "Fund Transfer Confirmation".

Please make a note of the following confirmation number: 52258611541

You have completed this transaction on May 29, 2014 4:55:08 PM EDT. Transactions completed before 4:00 PM EDT or the close of the New York Stock Exchange on any business day will be reflected in your account the following day. You may cancel this transaction before that time by selecting this transaction again.

Your transaction will be reflected in your Oregon Savings Growth Plan account on May 31, 2014.

You have processed the following fund transfer:

From:	To:
LifePath 2035 Fund \$0.04	TARGET RETIREMENT DATE
	LifePath 2045 Fund
	100%
	Total:
	100%

The confirmation number acknowledges that you have completed this transaction. A confirmation statement will be mailed to you in two business days. You should receive it within five to seven business days.

If you have elected electronic delivery, a confirmation statement will be available to view in your on-line mailbox within two business days. You will receive an email notification to the address saved within Mail Preferences when your confirmation statement has been posted to your mailbox. Please Note: Certain confirmation statements are not available to be sent electronically and will be sent through regular mail.

This transaction changes your current balance. In order to change how your future contributions are invested, use the **Change Elections** transaction.

[Sitemap](#)

© 2010 ING. All rights reserved.

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