Accessing Plan Forms Online

1. From the usicg.com home page, click the Retirement Account Access link on the right hand side of the screen.
2. Click the View Plan Forms link, which is the second link under the Participant Account Services menu on the right hand side of the screen.
3. The next screen will show Forms listed in the middle of the screen and you can choose the type of form you need as explained below:

Distribution Forms

I. If you select Distribution Forms, you will have two options to choose from: is your home address in the U.S. or not in the U.S.?
II. If your home address is in the U.S., select Click here under this option. [If not a U.S. address select that option and you will get a screen to complete the required W-8BEN form and then you may continue following the steps below].
III. Read Important Information Regarding Your Payment then click Continue.
IV. Read the Tax Notice and check the box to acknowledge you have read this Notice (you can also print it for your records from this screen). Then choose the Click here button beneath the acknowledgement to continue and access the forms for your plan.
V. Enter your Plan ID# and the 1st three alpha characters of your plan name (codes can be found on your quarterly statement) then click Submit.
VI. Scroll down and in the middle of the screen you will see a heading entitled ***FORMS*** with your plan’s distribution forms listed below it. Click on the name of the form(s) you want to view and print.

Administrative Forms

I. If you select Administrative Forms, you will be immediately brought to a screen where you must enter your Plan ID# and the 1st three alpha characters of your plan name (codes can be found on your quarterly statement). Click Submit.
II. Scroll down and in the middle of the screen you will see a heading entitled ***FORMS*** with your plan’s administrative forms listed below it. Click on the name of the form(s) you want to view and print.