

# e-Notification

FOR INVESTMENT CONSULTANTS

## WHAT IS e-NOTIFICATION?

By using the **e-Notification** service, investment consultants can be automatically informed of a participant distribution. If a plan sponsor submits a request online through e-Distribution, you will be automatically notified of the distribution amount via email. If you choose, you can select the minimum distribution amount for which you receive notification. If you do not select an amount, you will be notified of distributions in the amount of \$25,000 or more. This service will give you the timely information needed to easily capture rollover assets from retirement plan participants.

## WHAT ARE THE FEATURES OF e-NOTIFICATION?

**e-Notification** allows you to:

- decide if you would like to be notified of distributions from all of your plans, only certain plans, or not at all.
- determine the minimum distribution amount of which you want to be notified for each plan.
- receive notification of a distribution within 30 minutes after the plan sponsor has initiated the request through e-Distribution.
- receive, as part of your notification, the participant's contact information, plan name and Trust ID, and the distribution amount.

## HOW DOES e-NOTIFICATION WORK?

**e-Notification** will only work if we have your correct email address. You can confirm that we have your correct email address by calling your client services representative at 800.753.3682.

Go to [www.firstmerc.com](http://www.firstmerc.com) and select **e-Notification** within the **Maintenance** tab.



**O**ur e-Services are designed to help investment consultants manage the day-to-day operations of their retirement plans online. These services offer an efficient, user-friendly way to handle the routine functions for successful plan management.