



# PREMIER SERVICES

Sign up now!  
[www.icmarc.org](http://www.icmarc.org)  
 800-669-7400

Status Levels & Account Balance Ranges		
Preferred \$50,000 — \$99,999	Elite \$100,000 — \$199,999	Summit \$200,000+

## FREE SERVICES

Service	Icon	Preferred	Elite	Summit
Premier Services Line	☎	Yes	Yes	Yes
Annual Age-Based Financial Tips	✉	Yes	Yes	Yes
Fund Advice	☎	Yes	Yes	Yes
Online Finance Multimedia Tools	☎	Yes	Yes	Yes
Annual Tax Planning Guide	✉	Yes	Yes	Yes
Online Family Records Organizer	☎	Yes	Yes	Yes
Financial Needs Assessment	☎	Yes	Yes	Yes
Consultation with a Financial Planning Specialist	☎		Yes	Yes
Goal-specific Financial Plan	☎		Yes	Yes
Weekly or Monthly Summary Account Statement	✉		Yes	Yes
Your Daily Share Prices	✉		Yes	Yes
Financial Express Newsletter by email	☎		Yes	Yes
Kiplinger Retirement Report Magazine by email	☎			Yes
Comprehensive Financial Plan	☎			Yes

As a valued investor, you are eligible to join the Premier Program entitling you to all of the services highlighted above at no cost!

## ICMA-RC PREMIER PROGRAM SERVICE DESCRIPTIONS

**Premier Service Line** – When contacting us by phone, you will have access to a team dedicated exclusively to serving you as a member of the Premier Program.

**Annual Age-Based Financial Tips** – As you get older, your financial strategies should change. Each year we will send you tips updating you on financial issues you should consider based on your age range. Available via email or mail.

**Fund Advice** – Fund Advice, a service offered through our Guided Pathways™ program, provides you with a recommendation of specific funds developed from the investment options available within your employer's retirement plan.

(Over)

**Online Finance Multimedia Tools** — Listen to financial tips directly from professionals. Videos on a variety of financial topics are available to you as a Premier member on ICMA-RC's website.

**Annual Tax Planning Guide** — Each year, you will receive a brochure with useful tax tips addressing tax law changes that may affect your financial situation. Available via email or mail.

**Online Family Records Organizer** — Organize your family's financial, property, medical, and other records for easy access. Forms and tips from the editors of Kiplinger's Personal Finance magazine<sup>2</sup> are available to you as a Premier member on ICMA-RC's website through Account Access.

**Personal Consultation with a Financial Planning Specialist** — What financial resources will you need in retirement? How should you get started? How should you save for a rainy day? Let one of our financial planning specialists help you determine whether you are on track to meet your financial goals. Consultations are conducted over the phone or in person (where available).

**Goal Specific Financial Plan** — Are you planning to pursue higher education, buy a home, or take on another significant expense? Let our financial planning specialists provide you with a financial plan designed specifically for you and your goal.

**Financial Needs Assessment** — Receive an electronic assessment of your individual financial situation created by our financial planning specialists, and learn what it will take to meet your goals for retirement.

**Your Summary Account Statement** — Effortlessly track the status of your account. When you elect this option, you can choose to receive a weekly or monthly account summary including the total balance of your ICMA-RC account(s) as well as the balances in the funds in which you have invested. Available via email or fax.

**Your Daily Share Prices** — Easily follow your ICMA-RC investments. When you elect this option, we will send updated share prices for investments every day. Available via email or fax.

**Financial Express Newsletter by email** — The Financial Express newsletter, distributed via email, is a helpful service for the investor on the go, including articles from respected financial publications on topics such as investing, making your savings last, estate planning, health care, taxes, insurance, travel and more.

**Kiplinger's Retirement Report Magazine by email** — Receive a no-cost email subscription to Kiplinger's Retirement Report magazine,<sup>2</sup> offering you the practical advice and guidance you can use to plan and enjoy a rewarding retirement.

**Comprehensive Financial Plan** — Let our financial planning specialists provide you with a comprehensive financial plan based on your individual situation and a realistic assessment of your financial future.

For more details on all Premier Program services, visit ICMA-RC's website at [www.icmarc.org](http://www.icmarc.org) and log into your account through Account Access or call the Premier Services line at 800-669-7400.

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