



## Manage It For Me<sup>®</sup> Opt Out Form

**PLEASE NOTE: You may discard this form if you plan to continue with 401k Toolbox's Manage It For Me<sup>®</sup> as your professional investment advisor**

Your Plan Sponsor has **chosen 401k Toolbox's Manage It For Me<sup>®</sup>** service as the Qualified Default Investment Alternative (QDIA) for your plan. PMFM, Inc., as a registered investment advisor for 401k Toolbox<sup>®</sup>, will soon begin providing account management for your retirement account.

Both new and current 401k Toolbox Manage It For Me<sup>®</sup> plan participants will automatically receive a reduction in the Manage It For Me<sup>®</sup> fee to 0.75% as a result of group pricing related to QDIA.

You do NOT need to complete this form to continue with 401k Toolbox<sup>®</sup>.

If you do not wish to take advantage of 401k Toolbox<sup>®</sup>'s account management services and prefer to choose and manage your own investment options, you must complete the information below, then sign and return this form to 401k Toolbox<sup>®</sup> prior to the effective date\* of the Manage It For Me<sup>®</sup> service.

\*Print Name: \_\_\_\_\_

\*SSN: \_\_\_\_\_ Daytime Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

\*Employer Name: \_\_\_\_\_

\*Must be completed in order for your form to be accepted and processed

I acknowledge that my Plan Sponsor has chosen a qualified default investment alternative to provide professional account management services for my account. I hereby choose to forego those services and take responsibility myself for future investment decisions related to my 401(k) account. Further, I understand that by completing this form and returning it to 401k Toolbox prior to the effective date\*\* of the program, I will not receive the professional management services offered.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Please fax completed form to (706) 353-9832 or mail to:

401k Toolbox 1061  
Cliff Dawson Rd.  
Watkinsville, GA 30677

\*\*This form expires on the effective date of the Manage It For Me<sup>®</sup> as the QDIA. If you are unsure of the QDIA effective date of your plan you may call 401k Toolbox<sup>®</sup> at 800-222-7636 or contact your plan trustee. Any opt-out forms received after the effective date will not constitute an opt-out of the Manage It For Me<sup>®</sup> service. If you wish to terminate your enrollment in this program after the effective date you may do so at any time by logging into your account at [www.getretirementright.com](http://www.getretirementright.com) and making your own investment allocations or by contacting 401k Toolbox<sup>®</sup> directly.