

Change Investment Funds

BSA Retirement Plan:

If you want to change to a different investment fund in a company you are currently using

- Contact the investment company directly by telephone
- Or, if you have set-up your access through the investment company website, you can change it online

If you want to change to an investment fund in a different company

- Contact the Benefits Office at extension 7516
- Complete BSA Retirement Plan Allocation Form
- If you do not have an account with the investment company you wish to add, you will need to complete the investment company application
- The Benefits Office will supply you with the investment company application
- The completed paperwork will be submitted to Payroll by the Benefits Office
- The Benefits Office will supply you with a Transfer Form to move monies from one investment company to another

BSA 401(k) Plan:

If you want to change to a different investment fund in a company you are currently using

- Contact the investment company directly by telephone
- Or, if you have set-up your access through the investment company website, you can change it online

If you want to change to an investment fund in a different company

- Contact the Benefits Office at extension 7516 or download the BSA 401(k) Plan Agreement for Salary Reduction from our website
- Complete the Agreement for Salary Reduction Form
- If you do not have an account with the investment company you wish to add, you will need to complete the investment company application
- The Benefits Office will supply you with the investment company application
- The complete paperwork will be submitted to Payroll by the Benefits Office or you
- The Benefits Office will supply you with a Transfer Form to move monies from one investment company to another