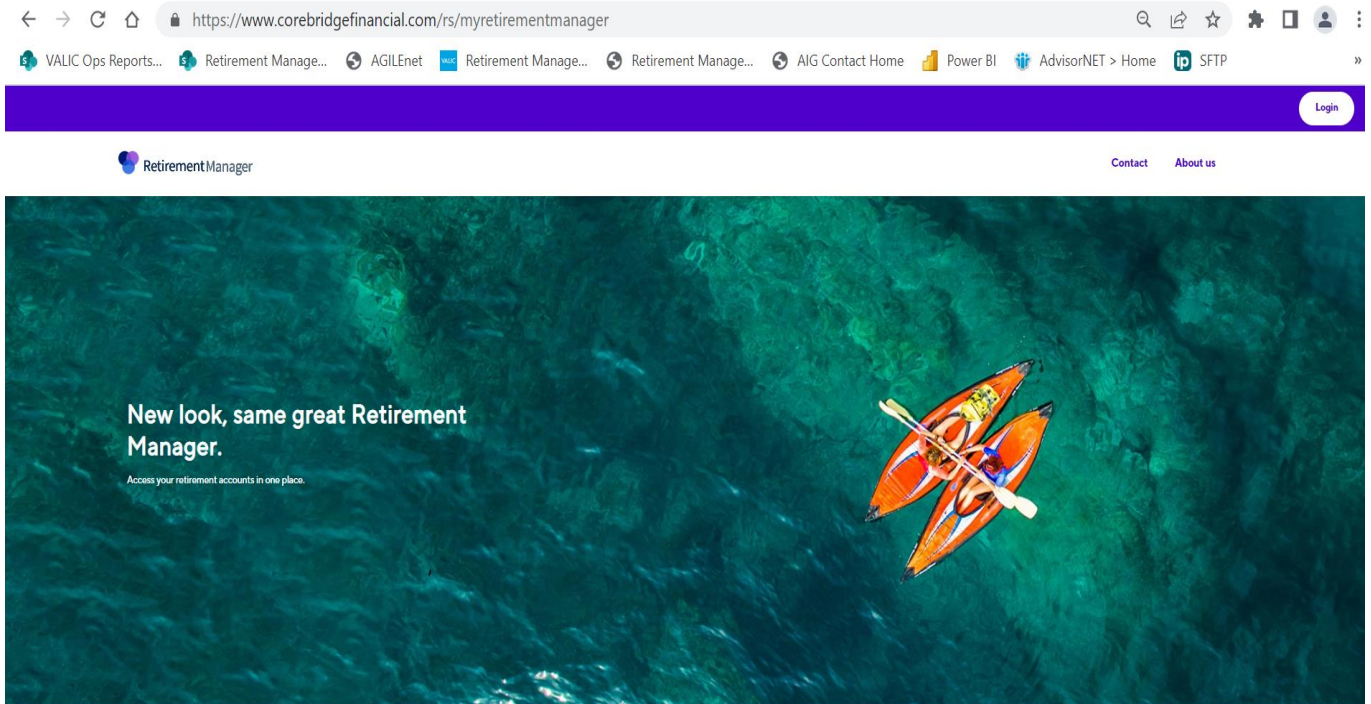
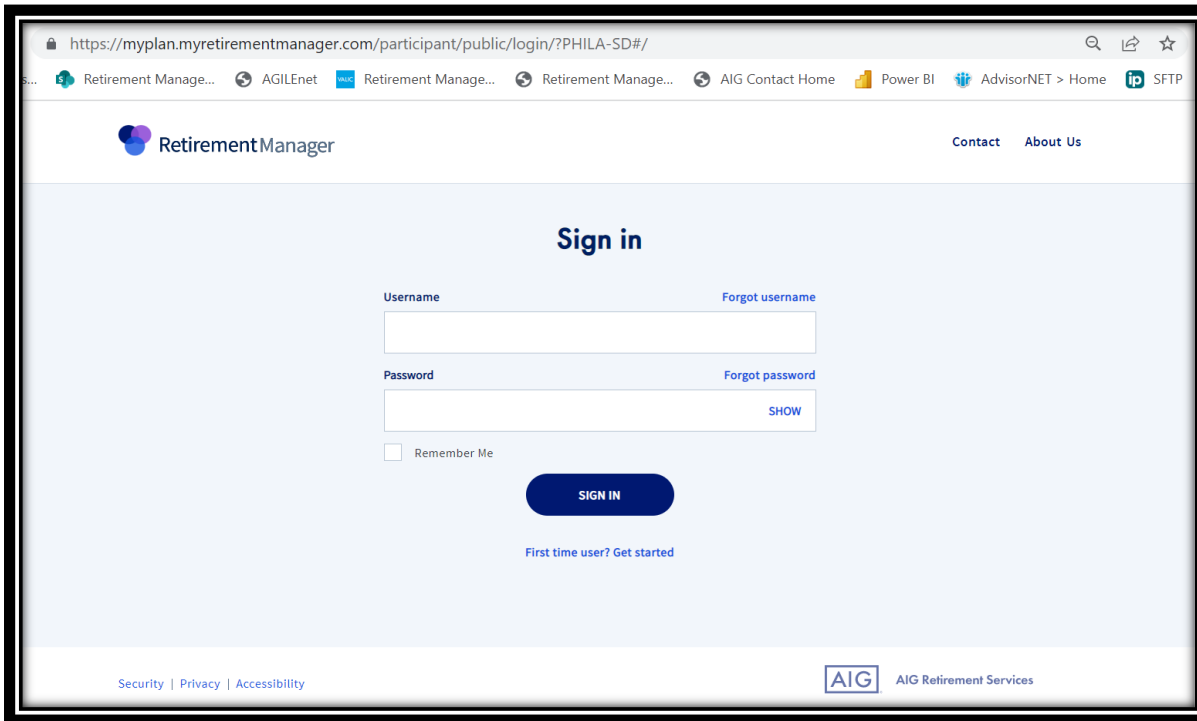


New User-Loan Certificate Instructions Go to www.myretirementmanager.com

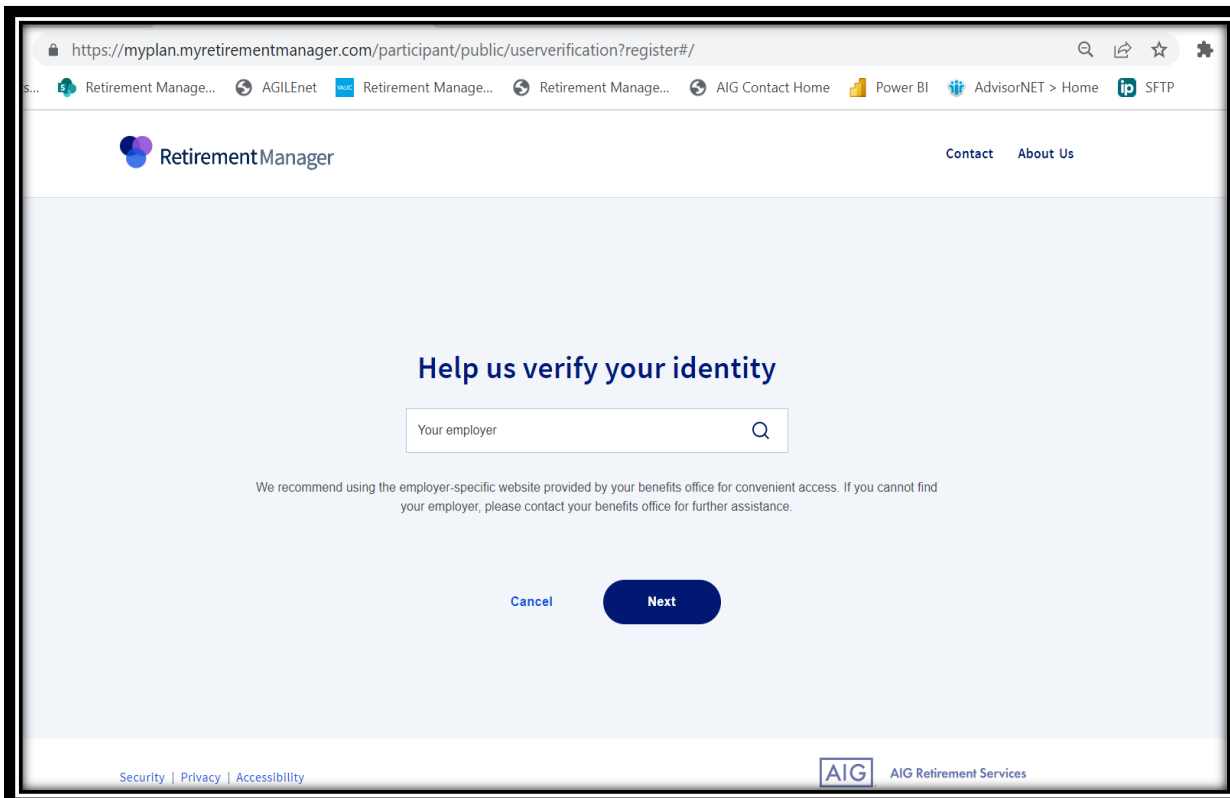
Retirement Manager Participant Call Center: 1-866-294-7950



Click Login and click Login link under Participant

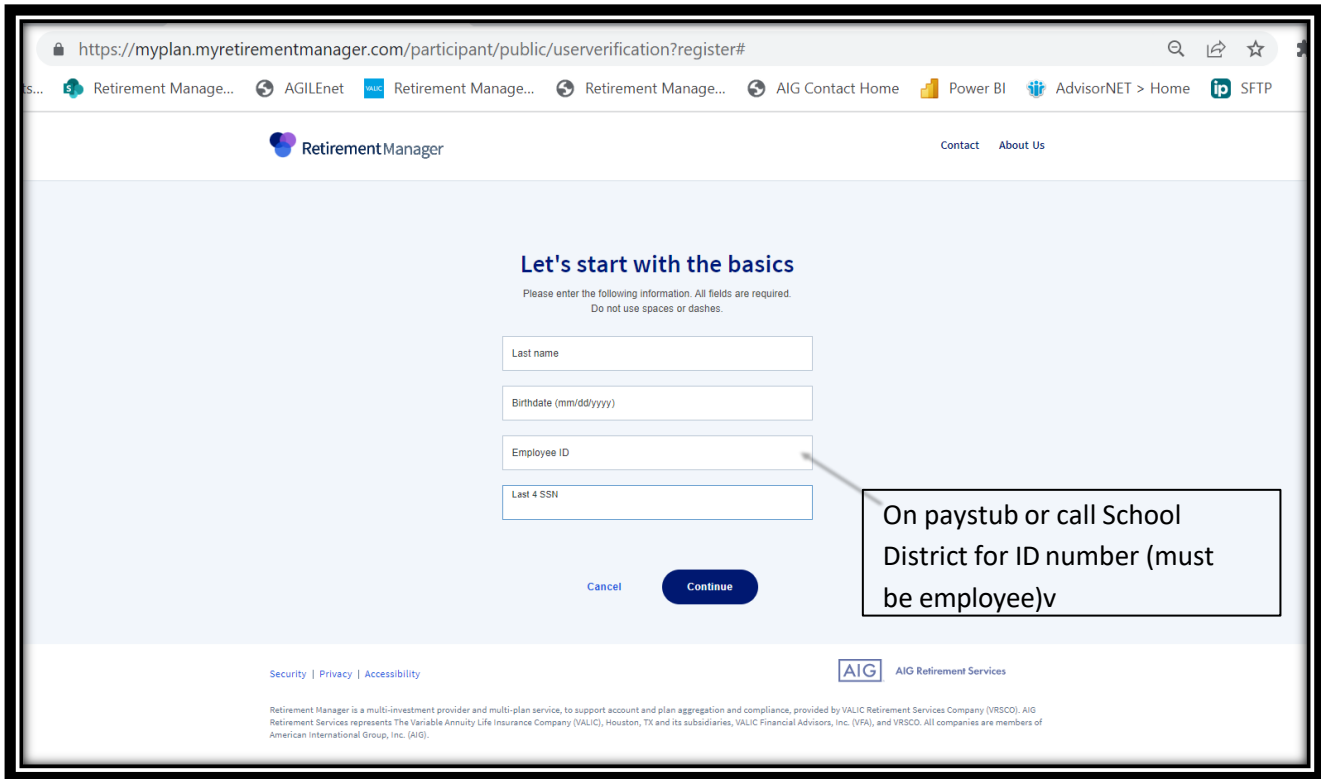


Click the “First time user? Get Started” button if you are a first-time user.



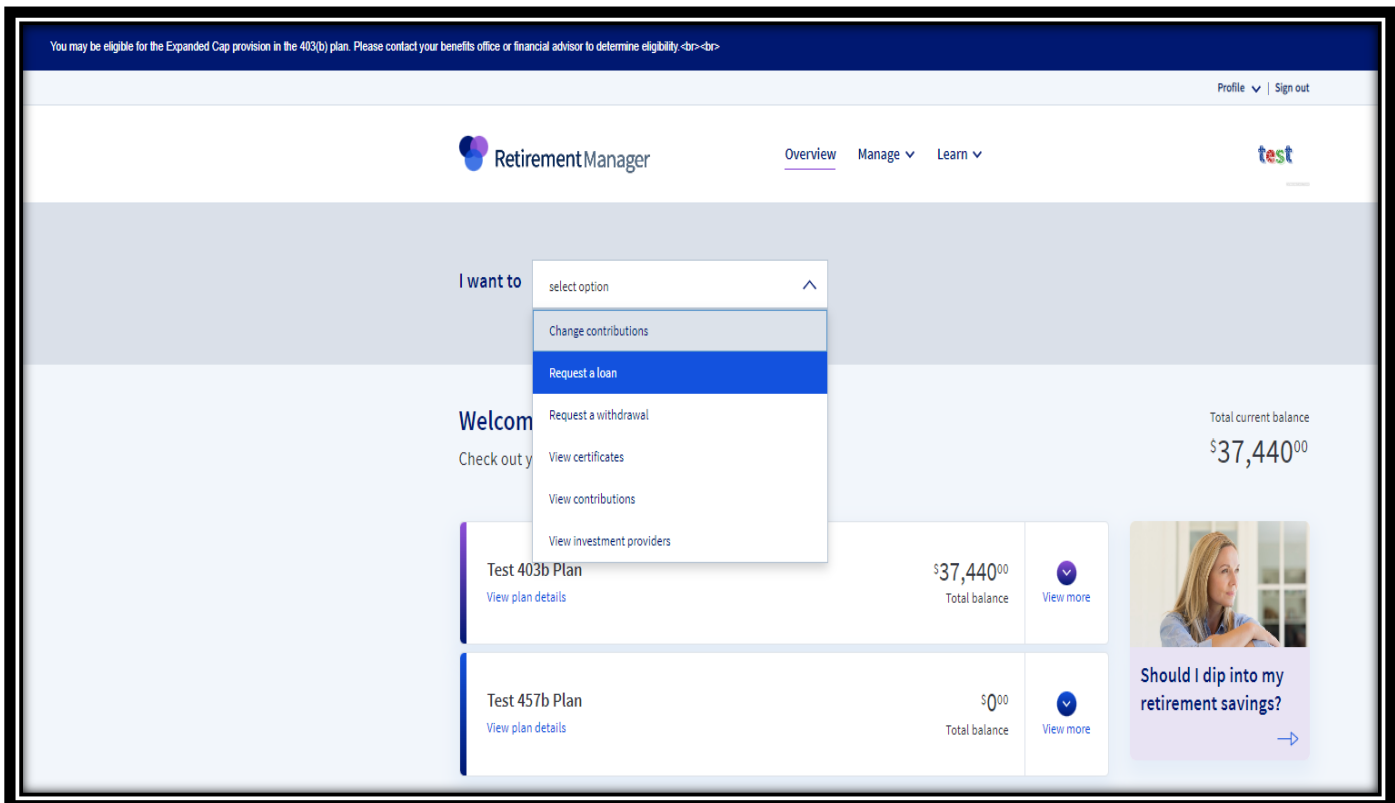
Enter School District of Philadelphia

Select Continue. You will be brought to page where you make a username and password, and select a picture to help remember your password if you forget. Please write down your username and password. You may have to sign in once your username and password is created, or click HOME once you have created your username and password.



Enter last name, date of birth, employee id (**Do not use spaces or dashes. Include leading zeroes to get your ID to 10 digits**), and last 4 digits of SSN

Select Continue. You will be brought to page where you make a username and password, select a picture to help remember your password if you forget. Please write down your username and password. You will have to sign in once your username and password is created.



From the participant overview page select “Request a Loan”

Profile | Sign out

RetirementManager Overview Manage Learn test

Request a loan

Select plan Review history Request amount Eligibility decision

Which plan would you like to take out a loan from?

Select a plan to continue.

Test 403b Plan	\$37,440 ⁰⁰ Total balance
Test 457b Plan	\$0 ⁰⁰ Total balance

[Back to Overview](#)

Profile | Sign out

RetirementManager Overview Manage Learn test

Request a loan

Test 403b Plan

Select plan Review history Request amount Eligibility decision

Please review and confirm your loan history.

Investment provider	Plan	As of date ⓘ	Loan status	Outstanding balance	
Test Vendor 2	457(b)	04/26/2023	Paid	\$0.00	Loan details ▾
Test Vendor 2	403(b)	04/26/2023	Paid	\$0.00	Loan details ▾

*If you believe there should be one or more additional loans reflected, you may want to contact your investment provider for additional information.

[Back](#) [Next](#)

-Select **plan type**

-Review and confirm loan history

https://myplan.myretirementmanager.com/participant/app/requestloan#

Retirement Manager Overview Manage Learn test

Request a loan
Test 403b Plan

Select plan Review history Request amount Eligibility decision

Please complete your loan request from each investment provider below.

Vendor	As of date	Account balance	Max loan available	Requested amount
Test Vendor 1	04/26/2023	\$8,090.30	\$4,045.14	
Test Vendor 2	04/26/2023	\$29,349.70	\$14,674.84	

*If you believe there should be one or more additional account balances reflected, you may want to contact your investment provider for additional information, or try your request again later.

- Select vendor(s) and enter loan amount

After all the above steps:

- -Click the “I Agree” button to the Terms and Conditions
- -Print the certificate that pops up in a separate window and attach to paperwork you would have received from your vendor. You can also save the certificate as a pdf.
- Since you are printing a certificate, you do **not** need a signature from the School District.