

## *Plan Participant/Employee Contact Information*



Phone: 800.248.8858

Fax: 877.513.2272

### FOR PLAN PARTICIPANTS/EMPLOYEES

Salary Reduction Agreement, Transaction Form, Providers, and other Forms and Information are all available on the website. (see instructions below)

[www.envoyplanservices.com](http://www.envoyplanservices.com)

For inquiries regarding General Customer Service please contact:

#### Salary Reduction Agreements (SRAs):

For general information regarding SRAs call us at 1-800-248-8858 or email us at [Info@envoyplanservices.com](mailto:Info@envoyplanservices.com)

To obtain an SRA form log on to website at [www.envoyplanservices.com](http://www.envoyplanservices.com)

- a. Click on Customer Service Center
- b. Click on your state
- c. Click on your county
- d. Click on your employer's section
- e. Click on the Forms tab
- f. Click on Salary Reduction Agreement

Complete the SRA form (it is a fillable PDF file), print it, sign and date and fax it to Envoy's toll free fax number 877-513-2272

#### Transactions:

Transactions include Contract Exchanges, Transfers, Loans, Rollovers, Hardship Withdrawals, all Distributions and Qualified Domestic Relations Orders (QDROs).

All transactions must be sent to Envoy Plan Services for approval on behalf of your employer. To submit a transaction request to Envoy for approval:

- a. Contact your provider and request their specific paperwork.
- b. Go to Envoy's website and obtain the Transaction Request Form and Instructions (located from Envoy's website home page under Forms and Tools)
- c. Complete and MAIL all of the paperwork to Envoy at:

#### Customer Service Center

Mailing Address: Envoy Plan Services, Inc.  
c/o MidAmerica  
211 E. Main Street - Suite 100  
Lakeland, FL 33801

Corporate Office: Envoy Plan Services, Inc.  
23332 Mill Creek Drive – Suite 170  
Laguna Hills, CA 92653