To obtain forms related to payments from your account, select "*Distribution Forms*"

To obtain other administrative forms and documents, select "*Administrative Forms*"

Choose Type of Forms

Distribution Forms

Administrative Forms

How To Access Plan Forms Online

1. From the **usicg.com** home page, click the **Retirement Account Access** link on the right-hand side of the screen under the **Direct Solutions Service Cente**r menu.

2. Click the **Plan Forms** link under the **Participant Account Services** menu on the right-hand side of the screen.

3. On the **Forms** page you will be prompted to choose the type of form that you need as explained below:

Distribution Forms

I. If you select **Distribution Forms**, you will have two options to choose from: is your home address in the U.S. or not in the U.S.?

II. If your home address is a U.S. address, select this option. [If NOT a U.S. address, select that option and you will view a screen that contains the required W-8BEN form that you must complete by clicking the **Form W-8BEN** button. Once you have filled in the highlighted fields, print the form, close the window and click **Continue**.] Follow the steps outlined below.

III. Read **Important Information Regarding Your Payment** then click **Continue**.

IV. Read the **Tax Notice**, which you can also print or download for your records by clicking **Print/Download Tax Notice**.

V. Click the **Access Distribution Forms** button to acknowledge that you have read the Tax Notice and then you may access the forms for your plan.

VI. Enter your Plan ID# and the 1st three alpha characters of your plan name (codes can be found on page one of your quarterly statement) then click **Submit.**

VII. You will see **Distribution Forms** on the right-hand side of the screen with your plan's distribution forms listed below this title. Click on the name of the form you want to view and print. If you open a form and wish to return to the list of available forms for the plan, click on the back arrow at the top of the screen. When submitting your distribution form, remember to include the completed Form W-8BEN if your address is not in the U.S.

Administrative Forms

I. If you select **Administrative Forms,** you will immediately be brought to a screen to enter your Plan ID# and the 1st three alpha characters of your plan name (codes can be found on page one of your quarterly statement) then click **Submit**.

II. You will see **Administrative Forms** on the right-hand side of the screen with your plan's administrative forms listed below this title. Click on the name of the form you want to view and print. If you open a form and wish to return to the list of available forms for the plan, click on the back arrow at the top of the screen.