Conversion Planning Checklist

There's nothing like a fresh start! In our ongoing effort to provide employees with the best possible retirement plan, we have recently completed a review of our retirement plan. In light of that evaluation, we are pleased to announce that we have selected BOK Financial as our new plan provider.

Key Takeaways:

- Your participation in the Plan – including your contributions and any Company Matching contributions – will continue without interruption.
- Your loan balance will transfer and will continue without interruption
- Your beneficiaries will NOT transfer. You will need to enter your beneficiaries.
- To facilitate the change, your current recordkeeper will liquidate all Plan Assets and transfer them to BOK Financial. For each of your current investment options, the Retirement Plan Committee has made every attempt to select new investment options with similar investment objectives and similar risk/return characteristics. Please look over the conversion notice carefully to understand how the investment mapping process will affect your investment choices.

Before Your Retirement Plan Conversion

	Action Items	***Resources***
☐	Read the Conversion Notice: Take note of key dates, instructions, and contact information.	*Conversion Notice*
☐	Take note of the last day to request and process a loan or distribution, change the amount you contribute, or change your current investment mix.	*Conversion Notice*
☐	Review Current Investment allocations: During the freeze period you will not be able to direct or diversify your investments. It is important that you review and consider the appropriateness of your current investments.	*Current Provider website*
☐	Review of Current Beneficiary Information.	*Current Provider website*
☐	Attend any Pre-Conversion Education meetings.	

During Your Retirement Plan Conversion

☐	Your existing account balances will automatically be transferred into investment options with objectives that are similar to those of your current investment options as indicated in the Investment Mapping Chart.	*Mapping Chart*
☐	Take this time to familiarize yourself with any new investment options.	*Conversion Notice*
☐	Take this time to learn about any new plan provisions.	*Conversion Notice*

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After Your Retirement Plan Conversion

☐	Log onto Start Right account. Create a User ID and Password. Update your email address and cell phone number.	*Start Right Online* *Start Right Mobile App*
☐	Add your Beneficiaries.	*Start Right Online* *Start Right Mobile App*
☐	Check your contribution and investment elections. Make changes if necessary.	*Start Right Online* *Start Right Mobile App*
☐	Rollover any old plans.	*Start Right Online* *Plan Forms: Rollover*
☐	Attend any Post Conversion Education meetings.	

Start Right Online Tools

My RetireRight Planner®
Use the My RetireRight Planner ® to help you determine how much income you will need for retirement.

Determine My Asset Allocation Calculator
Use this calculator to help determine your risk tolerance and build an investment portfolio

Financial Resource Center
Use articles, calculators, and videos to help your financial planning.

Start Right App

Start Right Website

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