



Meet Your ICMA-RC Retirement Plans Specialist

Brad Smith, Retirement Plans Specialist, Great Lakes Territory

Brad is your ICMA-RC Retirement Plans Specialist and he is motivated every day to help people succeed in building a path to financial wellness. He is responsible for providing on-site services, including participant enrollment, investment education, retirement readiness education, and individual educational meetings to public employee retirement plans in Wisconsin.

To help serve you better and for fastest service, below is a contact guide:

Please contact Brad at (E-mail: JBSmith@icmarc.org) if you need assistance with:

- Enrollment questions (457)
- Rollovers into your ICMA-RC account
- Investment strategy, account management, and how much to save
- Pre-retirement checkup

Log in to your ICMA-RC account at www.icmarc.org/login or contact ICMA-RC Investor Services at (800) 669-7400, if you need assistance with:

- Account log in or website resources
 - Investment changes (allocations and transfers between funds)
 - Withdrawals, loans, or distributions
 - Forms and brochure requests
 - Balance and quarterly statement inquiries
 - Account maintenance and transactions
 - Address, name, and beneficiary changes
 - All other questions
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www.icmarc.org

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