



Employer Resources

Everything you need to know about administering
your FICA Alternative Plan



Benefits funding made simple for the public sector.

Since 1995, MidAmerica has focused on providing simple, meaningful retirement and wellness funding solutions to the public sector. Our goal is to make the administration of your benefits easy through dedicated account management, total in-house administration, and stress-free plan implementation.

For over 20 years, we've been champions for the public sector. From our school districts and colleges, to fire departments and city halls - we're here for you because you're always there for us.

Thank you for choosing to partner with MidAmerica. We're happy you're here.

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Your Online Resources

Accessing your Online Account

Log into your account at www.midamerica.biz. From the homepage, select **Access Account** from the top right-hand side, then select **Sponsor Login**. Enter your Username and Password, which will be provided by your Account Manager. Once logged in, your dashboard provides a quick glance at the plan, including total plan balance and investment performance.

Generating Reports

1. Once logged in, from the choices at the top of your page, select **Forms & Reports**, then select **Reports**.
2. Under the **Report Selection** section, choose the report type you'd like to run.
3. Under the **Options** section, make sure the appropriate plan type is selected from the **Divisions** menu.
4. Select whether you'd like to run the report for all employees or just one.
5. Select your preferred file type and the plan year for which you'd like to run the report.
6. Lastly, enter the date range of your report and select **Submit**.

Finding Plan Forms and Plan Documents

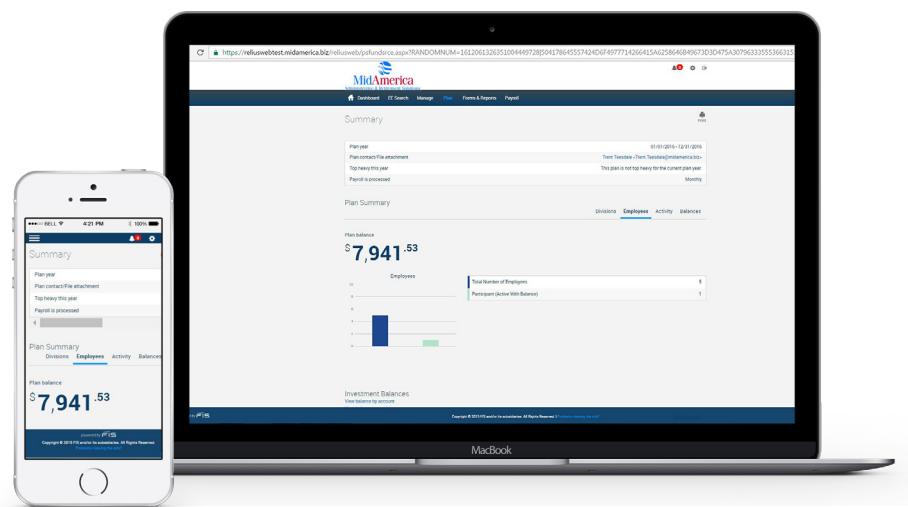
From the choices at the top, select **Forms & Reports**, then select **Forms**. You are able to select the desired document from the list or search for the form you need by using the **Filter Column** and **Filter Value** tools.

Managing Employees and Account Balances

From the choices at the top, select **EE Search**. Next, simply search for the employee using their Social Security Number, or find them by filtering alphabetically at the bottom of the screen. When you select an employee to view, the next page will immediately display their account balance.

Distribution Authorization

Each month, we will email you an Authorization List for your review and approval. The list contains the names of all participants who have requested a distribution from their account during the month. You then either approve or deny the distribution requests based on the eligibility requirements you have established under the plan, and email the list back to us.



Participant Resources

Your participants will receive a Welcome Kit containing all of the below information. However, we want to prepare you in case they come to you with questions. Here's what you need to know about your participants' online resources.

Accessing their Online Account

Participants log into their account at www.midamerica.biz. From the homepage, they select **Access Account** from the top right-hand side. Their initial Username is their Social Security Number (SSN) and their initial Password is the last four digits of their SSN. Next, they select **Participant Login**. They will then be prompted to update their login credentials. **Please note this is the only time they are required to enter their SSN to access their account.**

Viewing Investments

Once they are logged in, from the **Manage** menu, participants can review their investments, transaction history, and current balance.

Finding Forms

Once logged into their account, participants are able to access plan forms by selecting the **Forms** option from the **Forms & Reports** dropdown menu.

Helpful Resources

Once logged into their account online, participants are able to download other helpful materials from the **Forms & Reports** area. These resources include:

- Plan Highlights
- System guides

Customer Service

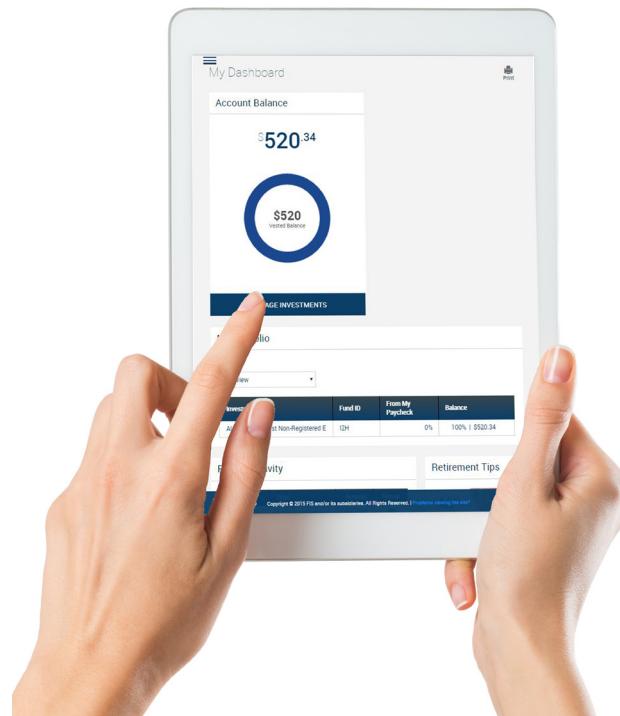
Participants can submit customer service inquiries a number of ways:

- Email: accountservices@midamerica.biz
- Online inquiry form through www.midamerica.biz
- Phone: (800) 430-7999

Customer Service Hours

Monday through Thursday, 8:30 am - 8 pm ET

Friday, 8:30 am - 6 pm ET



Data and Contributions

By completing your Data Requirements Spreadsheet, we're able to accurately capture your participants' important identifying details. This allows us to not only administer your plan properly, but gives us the opportunity to provide your participants with valuable electronic communications regarding their account.

Why am I asked to provide my participants' personal email addresses?

Personal email addresses are critical so that communications with the participant are uninterrupted in the event of retirement or separation from service. We want to provide valuable account information, important plan details and periodic updates to your participants as efficiently as possible, and in the way they prefer to receive it.

How can I upload data?

1. Go to <https://www.midamerica.biz/file-upload/employers/contributions-data/>
2. Complete the series of identifying questions, as well as enter the method of funding and the fund transfer date
3. Upload your Data Requirements Spreadsheet using the **Upload Function** at the bottom of the page

Tips for Filling out the Data Requirements Spreadsheet

- Populate all fields, including preferred fields.
- Employee Contribution for Period is the amount of the employee's contribution to the 3121 plan for that pay period.
- If employer contributions will be made, be sure to include that information in the Employer Contribution for the pay period column.
- Gross compensation for Period is the amount of the employee's gross compensation before taxes, including bonuses and other wages, for that pay period.

Please note: Employers are still required to pay Medicare taxes (1.45%) for each Employee on his/her gross wages.

Funding

We encourage you to submit funding through ACH or wire, as it is the most efficient and secure method. Funds submitted in this manner will be given priority when processing.

- ACH ROUTING NUMBER: 063100277
- WIRE ROUTING NUMBER: 026009593
- ACCOUNT NUMBER: 005562563459
- TITLE ON ACCOUNT: AUL 3121 Contribution Trust/ MidAmerica Administrative & Retirement Solutions, LLC
- BANK NAME: Bank of America, N.A.
- BANK BRANCH: Lakeland, FL
- BANK PHONE NUMBER: (863) 616-5318
- REFERENCE: (Employer Name) AUL Policy #*

For hardcopy checks, make payable to: AUL 3121 Trust

To send hardcopy checks and data, mail to:
MidAmerica Administrative & Retirement Solutions
Attn: Contributions Processing
P.O. Box 24957
Lakeland, FL 33802

For overnight or express deliveries, please send to our physical address:
MidAmerica Administrative & Retirement Solutions
402 South Kentucky Avenue, Suite 500
Lakeland, FL 33801

*The AUL Policy Number can be found on your New Business Agreement

Quick Tip

You must use the Data Requirements Spreadsheet MidAmerica provides.
Data is not accepted in any other format.