

# Just Retired Checklist

## What to do once you have access to your MidAmerica Retirement Benefit



### **Review your Welcome Kit and Plan Highlights.**

Once you have officially retired from your employer (and your employer has provided us with your data and benefit funding), MidAmerica will send you a welcome kit and a copy of your Plan Highlights filled with information about your benefit. You'll want to keep this welcome kit. Don't be tempted to toss it out with the slew of junk mail you receive! This handy piece of knowledge will instruct you on how to access your account online, where to find important forms, how to designate a beneficiary, and how to get in touch with MidAmerica.



### **Access your Account Online.**

If you haven't done so already, create an online user account so you can log in and check your account balance, review your investments and transaction history, move and rebalance your funds (if applicable to your plan), and download forms.



### **Update your Contact Information.**

While you're logged into your account, you can update your mailing address, email address, and telephone number. Why is this important? We don't want to lose touch with you just because you're not working any longer! We may have important information to share about your account, and we'd hate for you to miss out on the educational pieces MidAmerica develops to keep our participants in-the-know about the benefits they have.



### **Designate a Beneficiary.**

It's a good idea to keep your beneficiary information up to date—you can even designate or change your beneficiary by logging into your account. If allowed under your plan, your Welcome Kit will provide instructions on how to locate this feature online. If you prefer to mail or fax your designation to us, you can download the Beneficiary Form by logging into your account.



### **Learn About Your Investments.**

Your Plan Highlights, included with your Welcome Kit, will explain how your funds have been invested and what options you have regarding the management of your investments. For investment management guidance, more help is available at [www.myMidAmerica.com](http://www.myMidAmerica.com) within the Resources section.

