

Retirement Management Options

Payroll Department – City of Ripon

This retirement plan is a self-directed plan, which means you may choose how to invest your funds. You can manage the funds yourself, hire Bank of Stockton to manage your funds for a minimal fee of .25% or hire another investment manager to manage your funds (fees usually run 1% or greater). You may change your preferences at any time. Please complete this form in order to notify us on how you would like your Retirement Funds Managed. The form needs to be return to Geri VanGorkum in the Payroll/Hr department.

NAME _____

I plan to (choose one)

- Manage the funds myself
- Hire Bank of Stockton to manage the funds
- Hire another investment manager to manage the funds

Signature

Date

Please contact the Bank of Stockton if you need assistance in registering for online access.

Bank of Stockton Contact Information

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