

Plan Loan Request Process

The following process describes how participants in the Wake County Public School 403(b) and 457 (b) Plan(s) can initiate a Loan request from their existing 403(b) and/or 457(b) Investment Provider account to their Wake County Public School Voya 403(b) and/or 457(b) plan account.

Step 1: Obtain Plan Authorization Certificate via planwithease.com (“PWE”)

Plan Authorization Certificate: Wake County Public School System, as plan sponsor, must authorize all distributions from the plan in accordance with the rules established by the plan document including Loans. In an effort to streamline that process, Wake County Public School has enlisted the support of PWE. By logging into the PWE website and accessing your account, you will be able to generate the required Plan Authorization Certificate that is unique to your transaction.

The instructions for accessing your account through PWE and generating the appropriate certificate is attached. If you need additional help with logging on and navigating PWE, you may contact a PWE customer service associate at (855) 464-6928.

Reminder: some distribution requests may require additional documentation be mailed or faxed to planwithease.com for review before approval can be granted.

Step 2: Obtain Loan Form

Once you have an Approval Certificate from planwithease.com, you may contact the investment provider (previous and/or Voya) that you want to request the Loan form.

Step 2: Submit

Follow the investment provider’s instructions for completing the Loan request and provide them with the Approval Certificate, it serves as Wake County Public School’s signature and authorization for your distribution request.