MissionSquare RETIREMENT

Meet Your Retirement Plans Specialist

Rajesh Cheethirala
Retirement Plans Specialist
(202) 759-7129 | RGCheethirala@missionsq.org

Your salaried (non-commission-based) MissionSquare Retirement Plans Specialist is motivated every day to help you build a path to financial security. Your Retirement Plans Specialist is responsible for providing on-site services, including enrollment, investment education, retirement readiness education, and individual informational meetings. **To help serve you better, use the contact guide below:**

Contact your Retirement Plans Specialist, if you need assistance with:

- Enrollment questions
- Roll-ins into your MissionSquare account
- Investment strategy, account management, and how much to save
- A pre-retirement checkup

Visit the Retirement Education Center at www.missionsq.org/education for tips and tools to help you save, invest, and realize retirement.

Access your account at www.missionsq.org or contact MissionSquare Participant Services at (800) 669-7400, if you need assistance with:

- Account login or website resources
- Changing or verifing your 457 plan or Roth IRA contribution amount *(Roth IRA contributions can only be changed online.)*
- Investment changes *(allocations and transfers between funds)*
- Withdrawals or distributions
- Forms and brochure requests
- Balance and quarterly statement inquiries
- Account maintenance and transactions
- Personal information updates
- All other questions

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