

APRIL 2023

We hope our email articles are helpful.

Email address changes can be made through your district office on **TWCHub**.

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**OUR TOPIC TODAY: PRINCIPAL FINANCIAL GROUP (PFG) ISSUES**

**PFG CALL CENTER ASSISTANCE**

**PLEASE** be in touch with the Wesleyan Pension Fund office any time you have a question or need assistance with your pension account funds—relating to any issue. **DO NOT** call the PFG Call Center unless we have instructed you to do so because of a particular necessity that only they can help you with. The PFG operators are supposed to refer you to our office when you call them but sometimes, they forget that training. So, it's just better if you call or email our office first. We are usually able to help you with anything related to your pension account.

**PFG eSTATEMENTS**

WPF has opted for eStatements for our participants for the first three quarters of the year with a paper statement for year-end. eStatements will not post a statement but gives you the ability to enter a time or specific dates in your online account and the statement is produced online each time you request one. You can then print it or save a copy. To navigate to eStatements, log in to your online account, click on "Overview" in the menu and then click on "Statements" and "Sign up for eStatements." Update your preferences and choose your delivery options.

**PFG CHANGE FEES**

Principal is now assessing fees for errors and change requests made ... at \$300 each! WPF will only cover fees for their own errors. For any processing changes/errors made by participants, fees will be reduced from the participant's account. So, if you've submitted paperwork for processing and want to make a change when it has already gone to PFG, that will be cause for fee assessment. (Examples: Deciding to withhold or not withhold taxes from a withdrawal, a wrong bank account number or any information on paperwork that must be corrected, etc.)

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***We are happy to assist with any questions you may have about the Plan or any of the email articles!***

**NOTE:** The monthly email articles are available on our website in the **MONTHLY EMAIL** toggle box by topic and in the order they were produced and sent.

***Serving HIM for your benefit,***

**DEBRA LEVITE**

**DIRECTOR OF OPERATIONS**

**WESLEYAN PENSION FUND INC**

**P:** 317.774.3954 **T:** 800.595.4131 **F:** 317.774.3955

**ADDRESS:** 13300 Olio Rd, Ste 340, Fishers, Indiana 46037

[wesleyanpensionfund.com](http://wesleyanpensionfund.com) — [wpf@wesleyan.org](mailto:wpf@wesleyan.org)