



Account Management Options

Three ways to manage your account by phone

Call Toll Free (800) 352-0313

1. Automated Response Line (24/7)

- Touch Tone Phone: for quick access to account information and changes.
- Steps: Call our toll free number above. At the announcement, enter your Social Security number. If requested enter an account extension (1 or 2). Finally, enter your PIN. If you don't have a PIN, just follow the prompts to establish new one, or see page 2 of this handout.

2. Empower Call Center Services (7 am - 6 pm)

- Empower Phone Service Representatives: for simple account inquiries, investment changes and transfers with Empower Retirement Services.
- Steps: Call our toll free number above, press 0 at the first announcement. Then, ask to speak to representative and follow the phone prompts.

3. CCOERA Client Services (8 am - 5 pm)

- CCOERA Client Service Staff: for personalized retirement and investment counseling, and for advanced retirement plan design/consulting inquiries.
- Steps: Call our toll free number above, press 0 at the first announcement. Next, press 1 at the second announcement to be transferred to CCOERA's main office and staff. Press 0 to speak to our receptionist who will direct you to the CCOERA Client Services person who can help you.

Other ways to make account inquiries or changes

If you are not able to meet with a CCOERA Client Services Representative in person or if one of our phone options are not convenient for you, the following additional methods should be useful for managing your CCOERA retirement account(s) or for communicating with CCOERA:

- **Website services**: this is our most comprehensive automated service alternative that not only gives you access to basic account information and account change capability, but also enables you to obtain much more detailed investment and retirement research information, see page 2 of this handout.
- **Fax/Mail service**: all forms need to be faxed or mailed to our recordkeeping service, Empower Retirement Services. Faxing is best because you can keep the original and save on postage. All forms can be faxed to Empower using the most appropriate fax number that will appear on the form itself. A few things will have special requirements you might want us to help you handle. CCOERA's fax number is (303) 713-9413. **Please note that you may not make investment changes via fax or mail.**

We hope this information makes it easier for you to get the most out of the full range of services available to you through your CCOERA retirement plans. Please save this handout as a quick reference guide to managing your CCOERA retirement account(s).