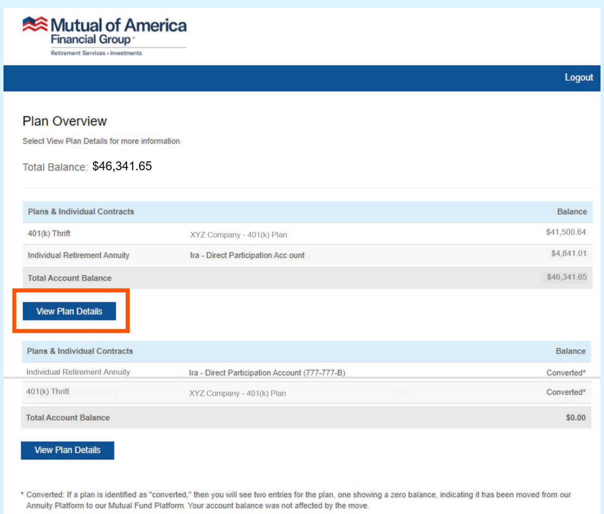
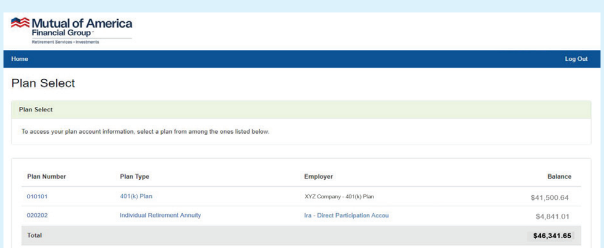
My Account User Guide
Fund to Fund Transfers

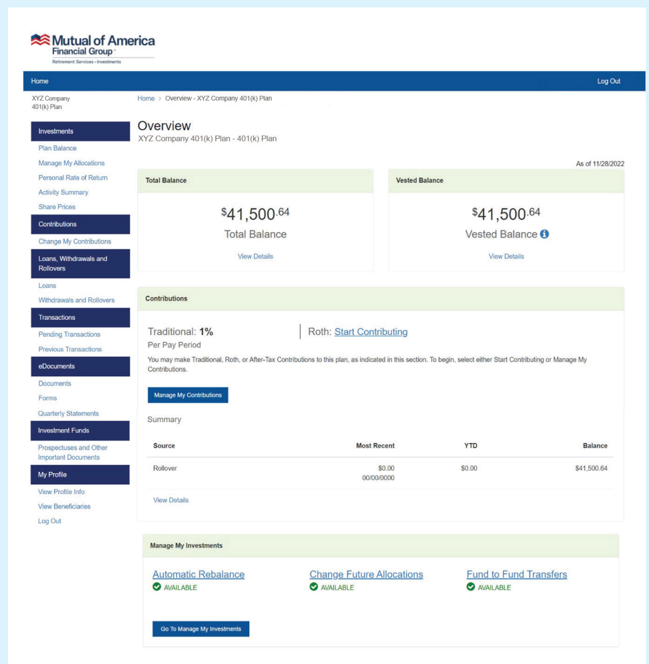
After you log in, you will see one of these two pages:

If you have more than one plan, you will see the Plan Overview page, as shown in the screen capture below. Click **View Plan Details**, then select your 401(k) Plan.

If you have only one plan, you can access the "Manage My Plan" features, including Fund to Fund Transfers, from here.

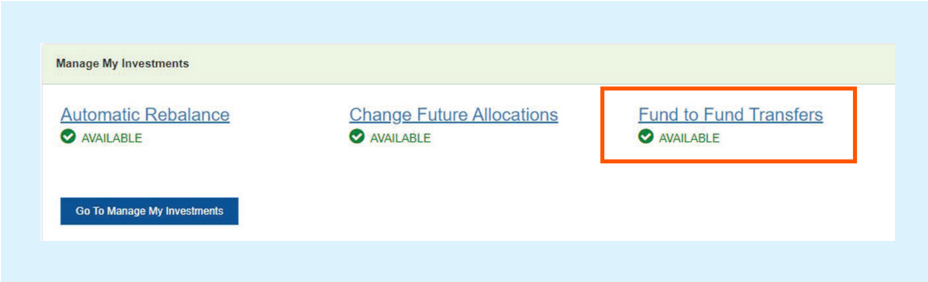






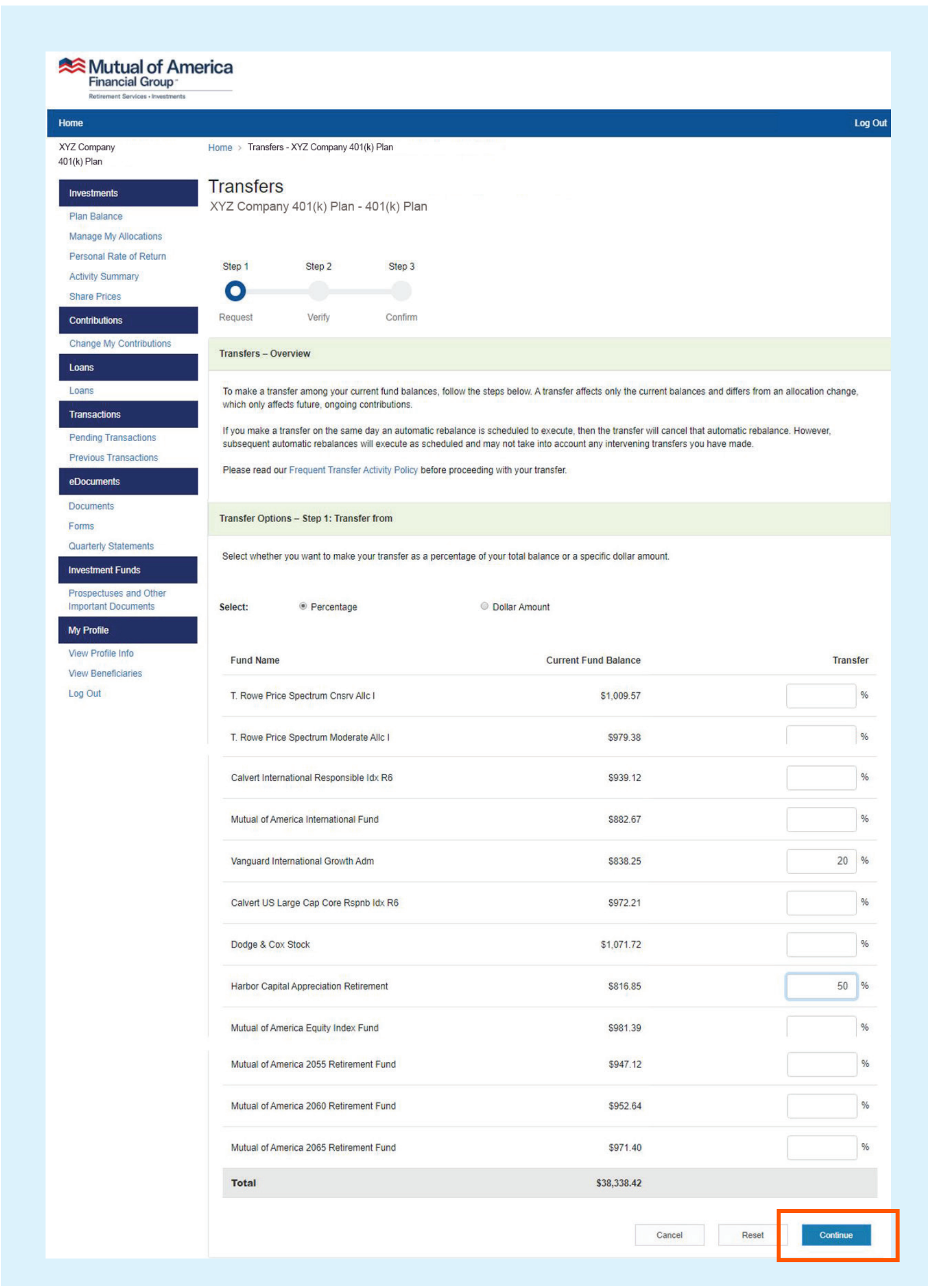
Information continued on following pages.

From the Plan Overview page, scroll to the bottom. Click **Fund to Fund Transfers**.



Fund to Fund Transfers – Transfer From

Select the investment options where money will be drawn from, as well as the percentage or amount to be removed from those investment options for transfer.* Click the **Continue** button when selections have been made.



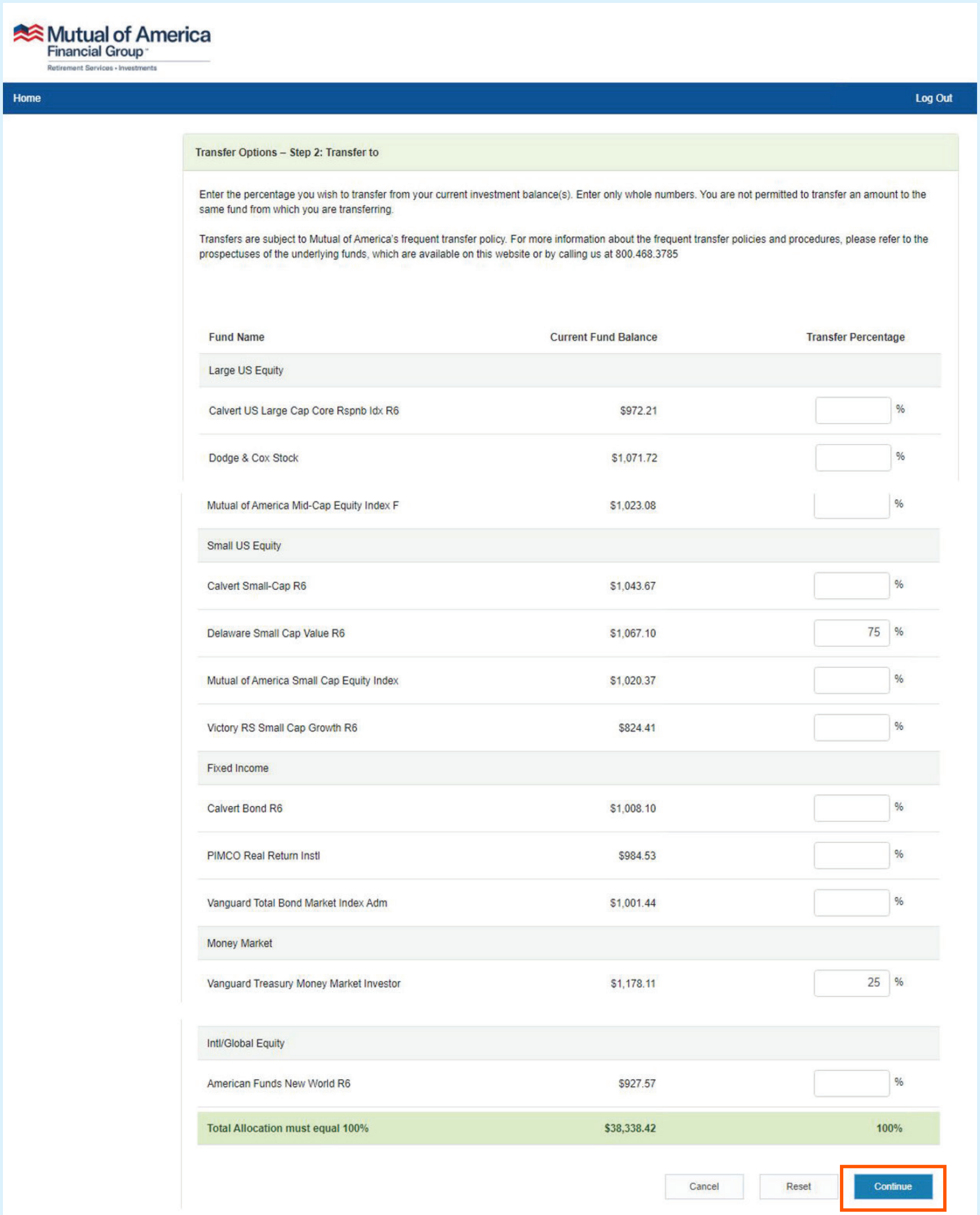
*Subject to Mutual of America's Frequent Transfer Policy.

Fund to Fund Transfers – Transfer To

Choose where the transferred money will go, as well as what dollar amount or percentage the selections will receive.*

Scroll up if you need to review your choices in the "From" step.

Note: The Continue button will not be enabled until the investment options that receive an increase total 100%.



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Transfer Options – Step 2: Transfer to

Enter the percentage you wish to transfer from your current investment balance(s). Enter only whole numbers. You are not permitted to transfer an amount to the same fund from which you are transferring.

Transfers are subject to Mutual of America's frequent transfer policy. For more information about the frequent transfer policies and procedures, please refer to the prospectuses of the underlying funds, which are available on this website or by calling us at 800.468.3785

Fund Name	Current Fund Balance	Transfer Percentage
Large US Equity		
Calvert US Large Cap Core Rspnb Idx R6	$972.21	%
Dodge & Cox Stock	$1,071.72	%
Mutual of America Mid-Cap Equity Index F	$1,023.08	%
Small US Equity		
Calvert Small-Cap R6	$1,043.67	%
Delaware Small Cap Value R6	$1,067.10	75 %
Mutual of America Small Cap Equity Index	$1,020.37	%
Victory RS Small Cap Growth R6	$824.41	%
Fixed Income		
Calvert Bond R6	$1,008.10	%
PIMCO Real Return Instl	$984.53	%
Vanguard Total Bond Market Index Adm	$1,001.44	%
Money Market		
Vanguard Treasury Money Market Investor	$1,178.11	25 %
Intl/Global Equity		
American Funds New World R6	$927.57	%
Total Allocation must equal 100%	$38,338.42	100%

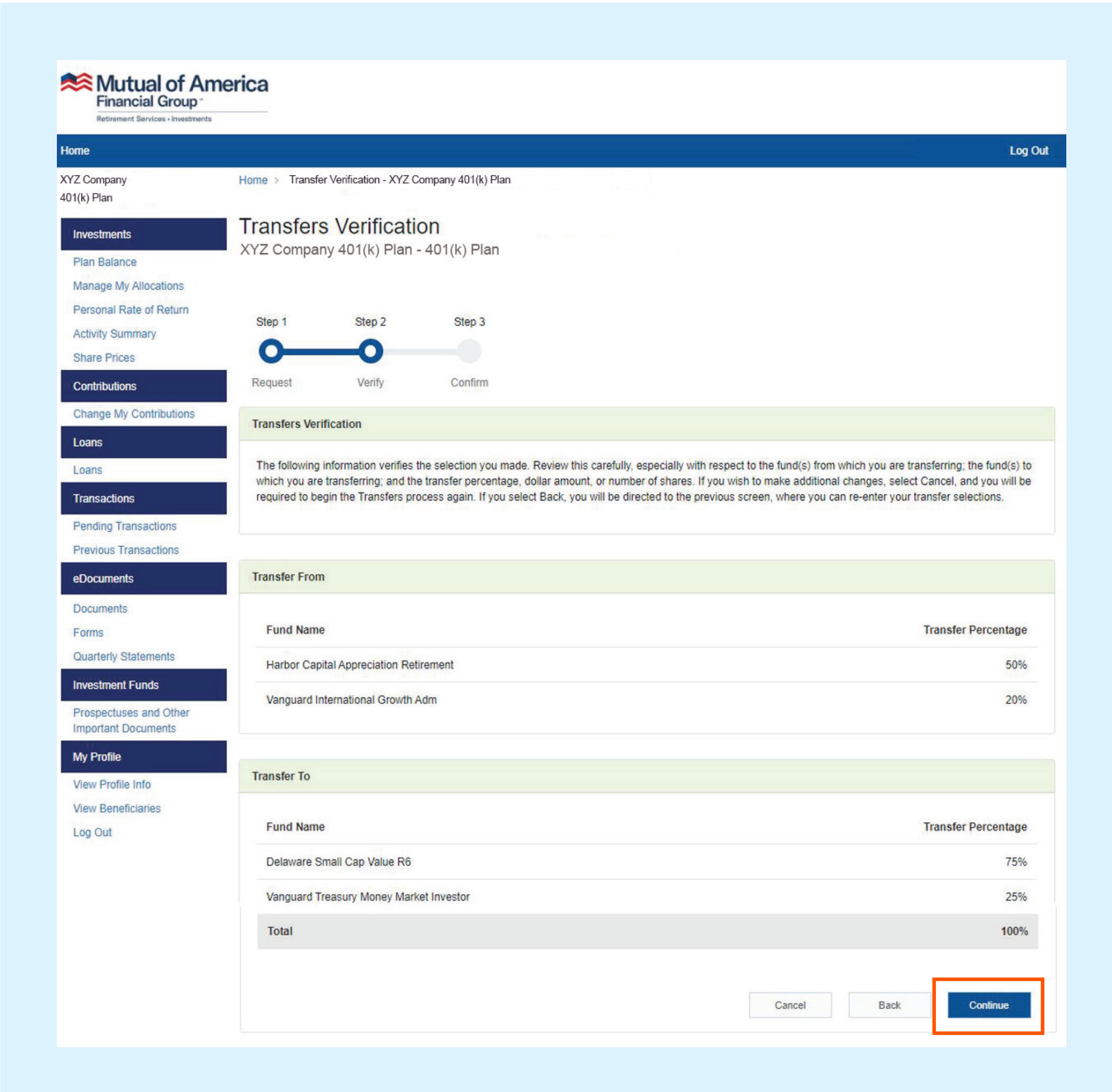
Cancel Reset Continue

*Subject to Mutual of America's Frequent Transfer Policy.

In the Verify step, you will see your investment choices as selected. At this point, you can return to the previous page to change your rebalancing options, or you can click the **Continue** button.

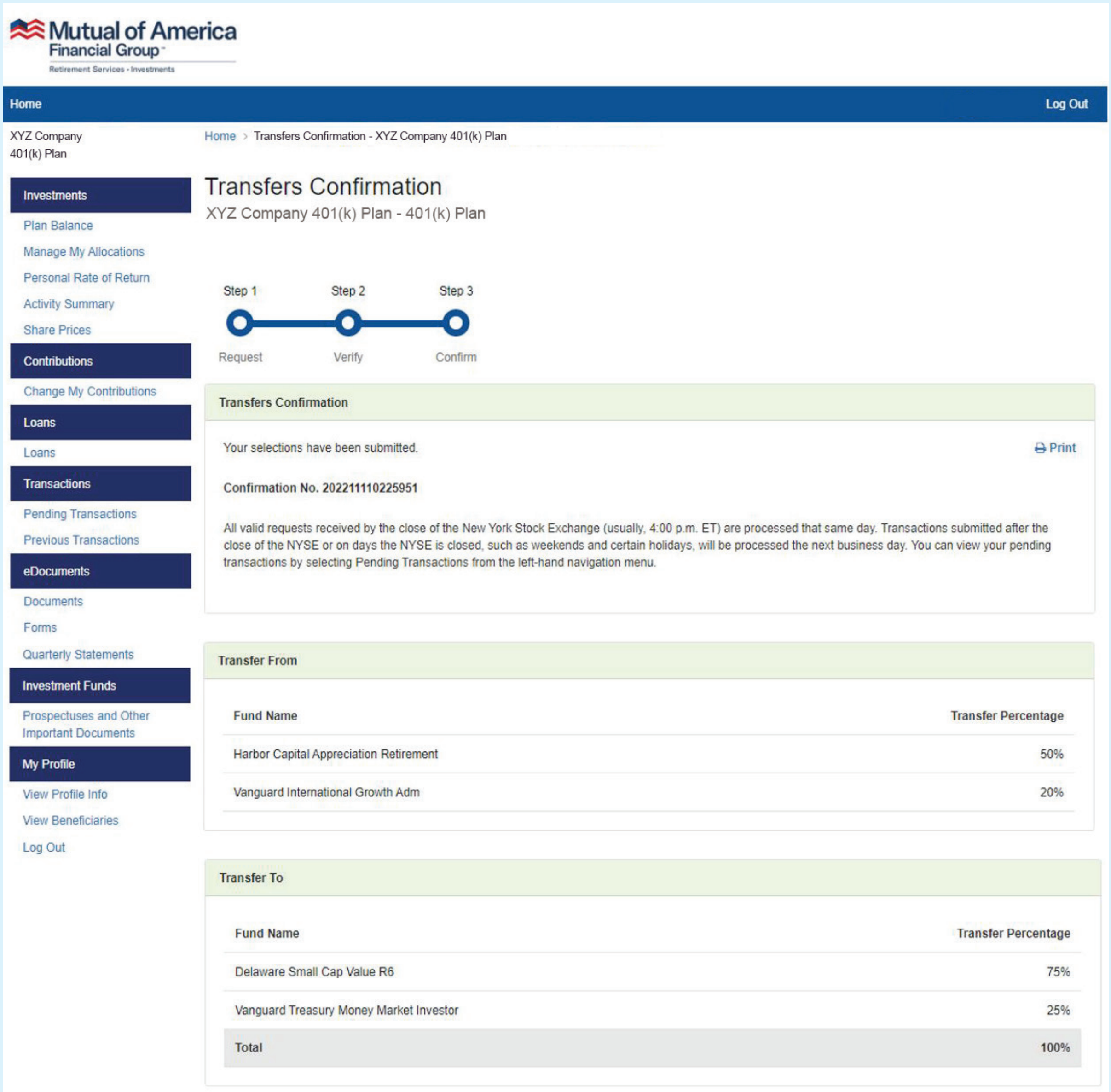
Note that the image below does not show the complete list of investment options available. Also, the investment selections shown in the image below are only for illustrative purposes.

Once your selections are made, click the **Continue** button.



In the Confirm step, you will see the same information that was displayed on the previous page. However, since your rebalancing preferences have been acknowledged, the page also contains a confirmation number for future reference.

Note that the investment image below does not show the complete list of investment options available. Also, the investment selections shown in the image below are only for illustrative purposes.

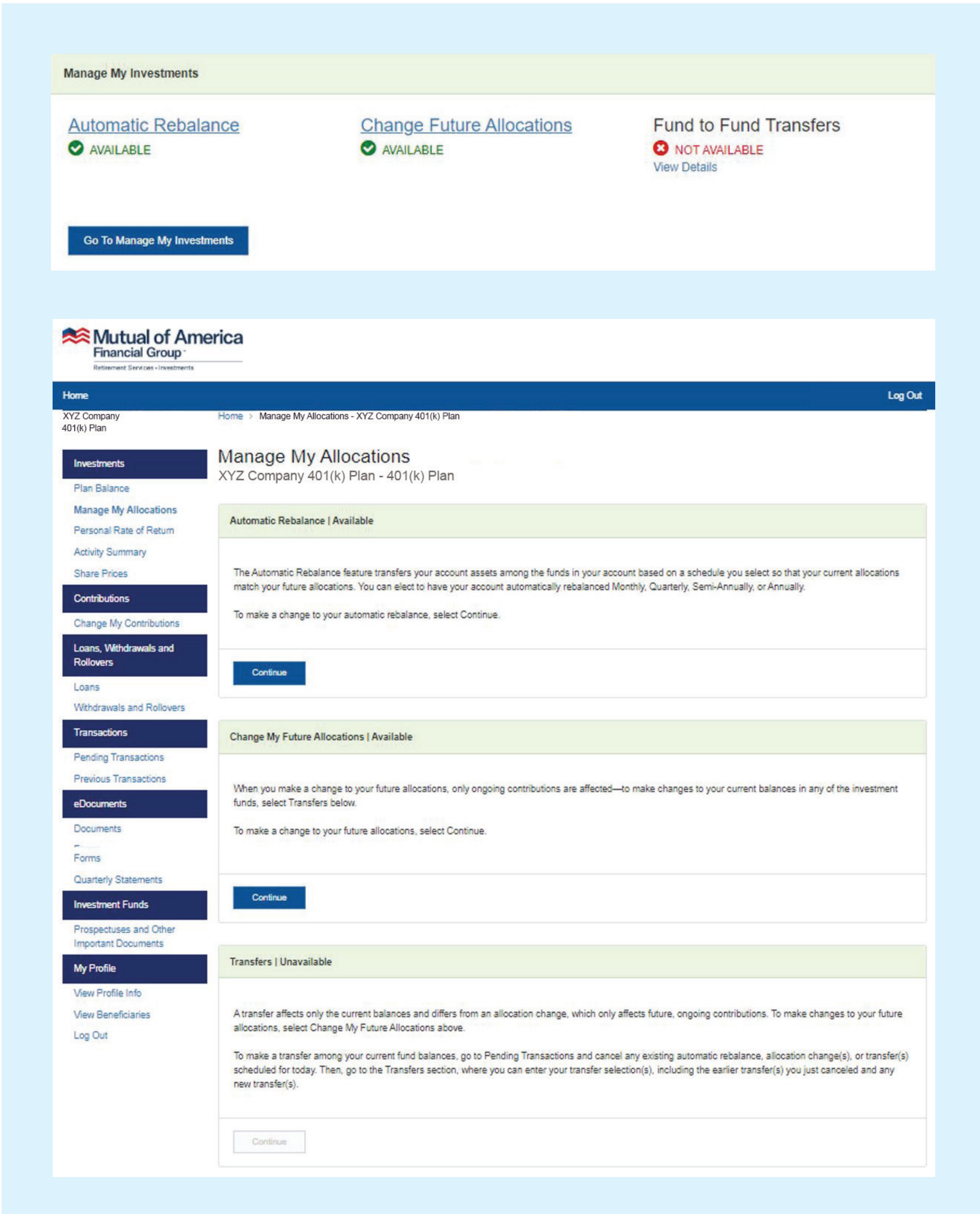


Immediately After Fund to Fund Transfer

You will be prevented from making another Fund to Fund Transfer until the first one has been acknowledged by the system.

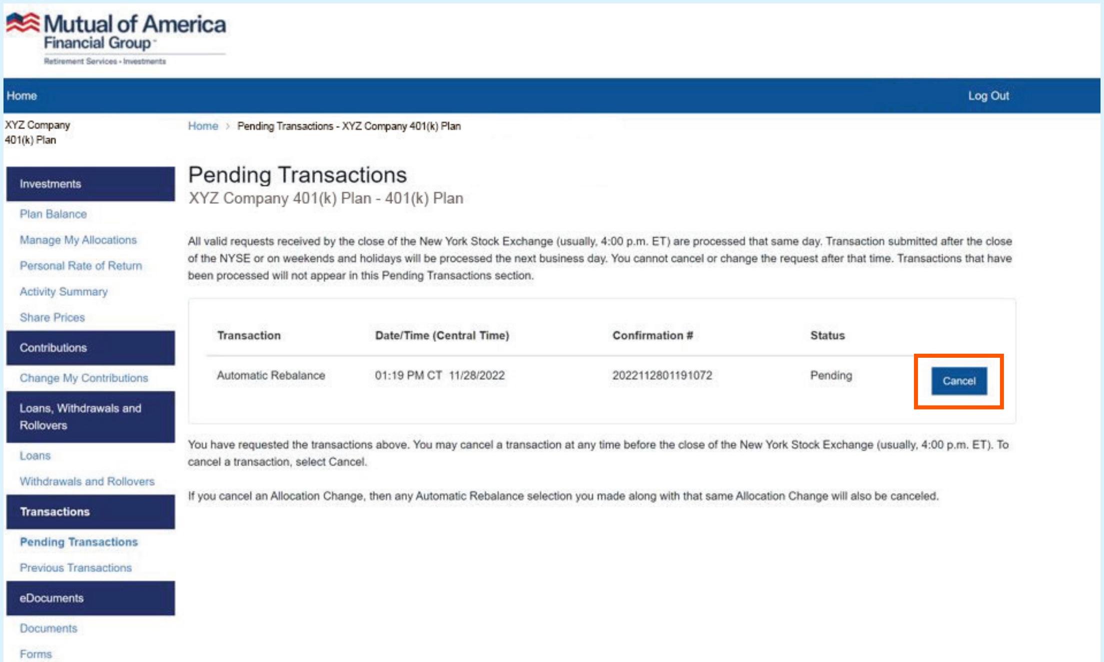
If the request is made before 4:00 p.m. ET, it should be processed by the start of the next business day.

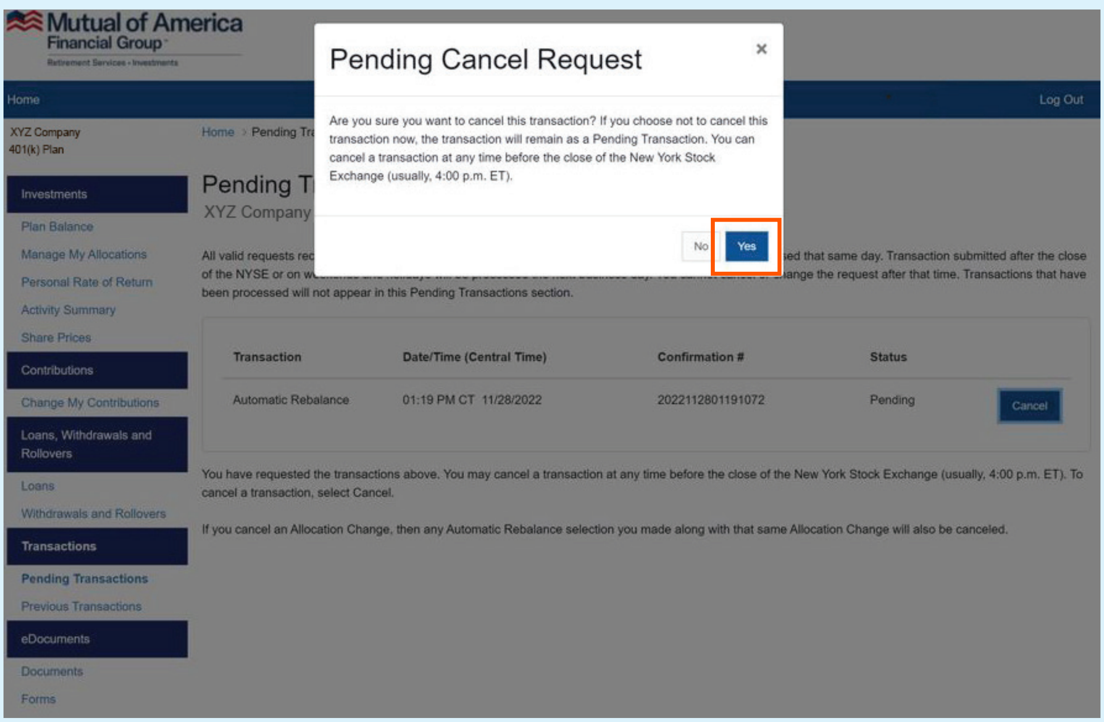
If the request is made after 4:00 p.m. ET, it should be processed by the start of the day after the next business day.



Canceling the Transfer Request

If your request has not yet been processed, you can cancel the request by clicking the **Pending Transactions** link on the left side of the page. Clicking on the **Cancel** button will bring up a prompt that will ask you to confirm your cancellation. Clicking the **Yes** button in that prompt will remove the request from the transaction list.





Canceling the Transfer Request (continued)