

Access Plan Forms and Documents for Enrolling Employees

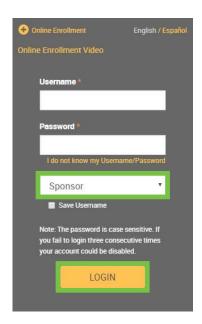
Visit https://www.yourplanaccess.net/retirementplanconsultants/

Type in your **Username** and **Password**, as provided in your welcome letter.

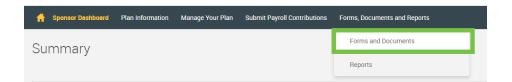
Select role from dropdown menu: Sponsor

Click the **Login** button

A One-time PIN (OTP) is required to login. If you need additional guidance with the OTP process, click the Logging in with **Multi-Factor Authentication (MFA)** link (located above this gray login box).



When enrolling employees, plan forms and documents can be accessed online and downloaded for open enrollments, etc. To run your plan specific documents, click the **Forms, Documents and Reports** Tab and select **Forms and Documents** off the dropdown menu.

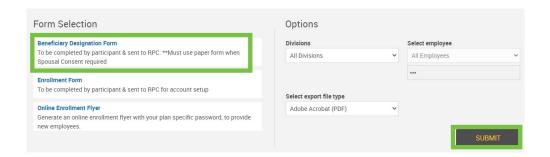


Choose **Generate Forms** off the dropdown list if not already shown and click the **Online Enrollment Flyer** in the Form Selection section shown and click the **Submit** button.

Plan Sponsor and Participant Forms				Pri
Operational Plan Sponsor Forms may be obtained by clicking	HERE. Operational Participant Forms	may be obtain	ed by clicking HERE.	
Enrollment Forms and Online B	Enrollment Flyers may be generated be	low.		
Get Reader				
Forms and Documents				
Generate Forms 💙				
Select form group				
None				
Form Selection	Options			
Beneficiary Designation Form	Divisions		Select employee	
To be completed by participant & sent to RPC. **Must use paper form when Spousal Consent required	All Divisions	~	All Employees	~
Enrollment Form To be completed by participant & sent to RPC for account setup				
	Select export file type			
Online Enrollment Flyer	Adobe Acrobat (PDF)	~		
Generate an online enrollment flyer with your plan specific password, to provide new employees.				
			S	SUBMIT

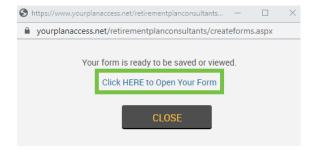


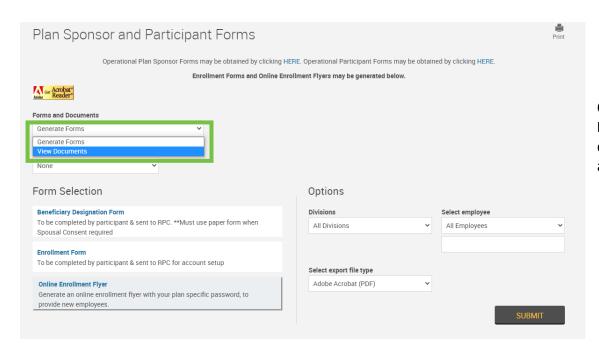
Access Plan Forms and Documents for Enrolling Employees



Next, choose **Beneficiary Designation Form** off the
Form Selection list and
click the **Submit** button.

The forms may take a little time to load and once loaded this pop-up box will be displayed. Follow the **Click HERE to Open Your Form** link to open the forms so they can be downloaded.





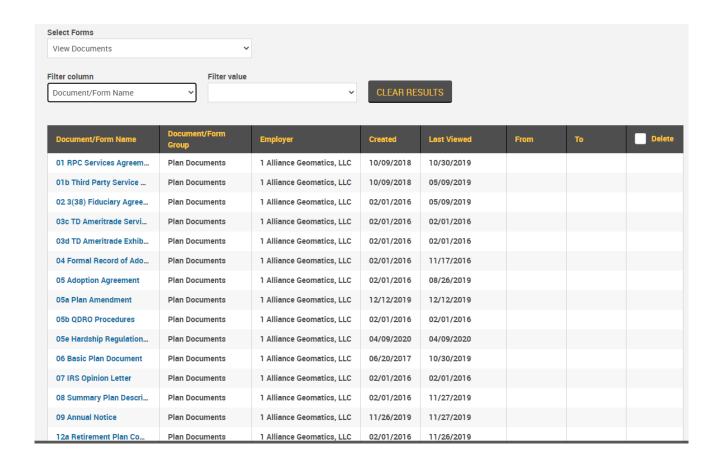
Choose **View Documents** off the dropdown list if not already shown.



Access Plan Forms and Documents for Enrolling Employees

The remaining documents will be located and can be directly downloaded from this screen by clicking on the document links, such as:

- 08 Summary Plan Description
- 09 Annual Notice
- 13 404(a)(5) Fee Disclosure
- 404(a)(5) Investments Comparative Chart



You can direct participants here: https://retirementplanconsultants.net/plan-participant-resource-center/ for an online enrollment guide with step by step instructions.