



# Online Enrollment

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

Online Enrollment English / Español

Online Enrollment Video

Username \*

Password \*

I do not know my Username/Password

Participant

☐ Save Username

Note: The password is case sensitive. If you fail to login three consecutive times your account could be disabled.

LOGIN

Click the **Online Enrollment** option on the top left.

Type the password provided to you by your Plan Sponsor (Employer) and click the **Next** button.

Back English / Español

## Online Enrollment

Enter the Plan Password provided to you by your Employer, Advisor or RPC. \*

Note: The password is case sensitive. If you fail to login three consecutive times your account could be disabled.

CANCEL NEXT

## Please enter social security number

Click Cancel to return to the main login screen.

SSN:  
(no spaces or dashes) \*

Date of Birth:  
(mm/dd/yyyy) \*

CANCEL NEXT

Type your **Social Security Number** (no spaces, no dashes) and your **Date of Birth** (mm/dd/yyyy) and click the **Next** button.



# Online Enrollment

Follow the **Enrollment Wizard** to enroll online. Please read all the instructions online before completing every step.

Enter a username and password of your choice.

Overall Progress: **0% Complete**

### Username Information

Items marked with an asterisk (\*) must be completed before you can proceed to the next step.

Establish your Username: Must be 6-12 characters (numbers and/or letters): \*

(alphanumeric digits, case-sensitive)

Establish your password \*      Re-enter password \*

(digits, case-sensitive)

Remember your Username and Password. You will need them to access your account via the plan website in the future.

Verification question *	Verification answer *
Alternate password/quote	<input type="text"/>
Verification question *	Verification answer *
Alternate password/quote	<input type="text"/>
Verification question *	Verification answer *
Alternate password/quote	<input type="text"/>

Select the dropdown to choose each **Verification question** and then enter your **Verification answer**.

When answering security questions it will need to be typed the same way answered here – capitalization, spelling, etc.

Complete your **Personal Information** details.

Please keep in mind that all items marked with an asterisk (\*) must be completed.

Scroll down to the **Email** section when the personal information is complete. Details for the remainder of this screen are on the next page.

✓ Your Personal Information

First name *	Middle name	Last name *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Marital status *	Birth date *	Date of Hire *
Single	01/01/1989	01/01/2021
Street address 1 *	Street address 2	
123 Rd	<input type="text"/>	
City *	State *	Zip code *
Norfolk	NE	68701
Country (if outside United States)		
<input type="text"/>		
One phone number is required *		
Home phone	Receives text messages	
+1 (555) 555-5555	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Office phone	Ext	Receives text messages
+1 Phone Number	Extension	<input type="radio"/> Yes <input type="radio"/> No



# Online Enrollment

Complete the **Email** details on the lower part of the screen. Please specify whether you prefer to receive important emails about your account to either your **Home** or **Office** email.

▼ Email

If you would like to receive confirmations of transactions, please fill out the following information:

One email is required \*

Home	Confirm home email address
<input type="text"/>	<input type="text"/>
Office	Confirm office email address
<input type="text"/>	<input type="text"/>

Where would you like to receive important emails about your account?

☒ Home ☐ Office

I wish to receive my participant statement electronically.

☐ No ☒ Yes

Be sure to continue through all steps of the enrollment process until you receive confirmation that your enrollment is complete.  
If you cancel or close your browser before completing the process, your enrollment will not be processed.

Electronic statements are recommended, but you can change this at any time when you log in to your account.

Click the **Next** button.

A One-Time PIN is required for authentication while logging into your account. It is recommended to choose an email to receive notifications so you can set your email to receive the One-Time PIN. It can also be sent via text message. Message and data rates may apply.

**Security Prompt**

Please answer the alternate verification question listed below. Once you have answered the question you will be directed into the web site.

What is your favorite food?

Do you want us to remember this computer, so you can avoid answering your alternate verification question(s) the next time you log in? We recommend that you only select "Yes" for your own private computer and leave the checkbox "unchecked" for public computers.

☐ Yes, remember on this computer.

Before you go to the next screen you will receive a security prompt, which will be a question from one of the security questions you just set up.

Answer the security prompt and then click the **Submit** button.



# Online Enrollment

Complete the **Designate Your Beneficiaries** section, providing as much information as possible.

***Please keep in mind, this is not a requirement, but recommended.***

Click the **Next** button.

Designate Your Beneficiaries Print

Overall Progress: **33% Complete**

NOTE: Spousal Consent is required if the participant is married and the designated Primary Beneficiary is not the participant's spouse. The spouse's signature must be witnessed by either (1) a representative of the plan or (2) a Notary Public. A form to complete this is located [HERE](#).

This designation can have important tax and legal effects; you may wish to consult your advisor before continuing.

Beneficiary Designation 1

Items marked with asterisk (\*) must be completed before you can proceed to the next step.

Beneficiary type: Primary Beneficiary percentage:

Name:  Relationship:  Birth date:  Social security number:

Street address 1:  Street address 2:

City:  State:  Zip code:  Country:

DELETE

ADD BACK **NEXT**

Overall Progress: **40% Complete**

Confirmation E-mail Address

A confirmation e-mail will be sent to [demoemail@email.com](mailto:demoemail@email.com). If this address is incorrect, please correct the address in the fields provided.

Update e-mail address:  Confirm e-mail address:  RESET

Current Contribution Amounts

Last Web Contribution	Total
Pre-Tax Deferral*	\$0.00 per pay period
Roth Deferral*	\$0.00 per pay period

Changes Pending

Change Contribution Amounts

Please enter the amount you would like your employer to deduct from your compensation each payroll period to be deposited into your retirement plan account. **\*Please make a selection for each Contribution Type listed below.**

[Click here for more information on how much you may contribute to the plan!](#)

Action	Contribution Type	Percent/Dollar	Current Contribution	New Contribution Rate
<span>1</span> <span>Set my contribution to:</span>	Pre-Tax Deferral*	<span>Percent</span>	Not contributing	8.00 per pay period
<span>2</span> <span>Set my contribution to:</span>	Roth Deferral*	<span>Percent</span>	Not contributing	0.00 per pay period

RESET BACK **NEXT** 3

- 1) On the next screen choose the **Action** dropdown menu next to each **Contribution Type** and select **Set my contributions to:** off the dropdown menu on each line.
- 2) Then update the **New Contribution Rate** to the desired amount for each contribution type. The amount reflects how much will be deducted for that type each pay period.
- 3) Click the **Next** button when all is correct.



# Online Enrollment

Choose a **Source of Money** from the list and insert the selected percentages for the investments of that source.

To select the same investment direction for all money, click the **All Sources** link.

Select Investments

Print

Overall Progress: **50% Complete**

Select a source of money from the list below to enter the election percentages for investments in that source. Please note that once you have completed the enrollment process, you can always change your investment election percentages.

We encourage you to contact your Financial Advisor with assistance in selecting your investment election.

Source of Money

If selecting different Investment Elections for your sources, remember to return to this step and complete for each source.

All Sources

Employee Roth Deferral

Employee Traditional Deferral

Employer Match

Employer Profit Sharing

Unrelated Rollover

If you do not provide investment directions for your contributions, they will be defaulted to the [Vanguard Target Ret 2055 Fund](#) until you provide other investment instructions. Once contributions are defaulted, it is your responsibility to realign them in accordance to your investment elections. For more information, please contact your plan administrator.

BACK

NEXT

Review Fund Performance and Prospectuses

I elect to invest all future contributions (including employee and employer contributions) as follows.

Confirmation E-mail Address

A confirmation e-mail will be sent to the address listed below.

If this address is incorrect, please correct the address in the fields provided.

Update e-mail address:

Confirm e-mail address:

RESET

> Rules and Criteria

▼ All Sources

Investment

Current Elections

New Elections

Expand investment category under **All Sources** to select investment.

If you need help determining your risk tolerance there is an Asset Allocation Questionnaire that can help you with determining your risk tolerance.

Once you have chosen elections equaling 100%, Click the **Next** button.

NEXT



# Online Enrollment

Review your information.

Click the **Submit** button.

Enrollment steps

Print

Overall Progress: **66% Complete**

Confirm & Submit

If your enrollment information is correct, click below to submit your enrollment request

Personal Information

Username: Testtest

First name: Online

Last name: Demo

Middle name: Enrollment

Street address 1: 123 Main

Street address 2:

City: Demo

State: NE

Zip code: 12356

Country:

Date of birth: 11/27/1998

Date of hire: 01/01/2020

Marital status: Single

Home phone: (555) 555 - 5555

Office phone: () - Ext

Home email address: demoemail@email.com

Office email address:

Send email confirmation to: Home

Edit

I wish to receive my participant statement electronically.

☐ No ☒ Yes

Salary Deferral Elections

Edit

Pre-tax contributions

Deduct 8.00% each pay period.

Roth 401(k) contributions

Deduct 0.00 each pay period.

If your enrollment information is correct, click below to submit your enrollment request

SUBMIT

Enrollment steps

Print

Overall Progress: **100% Complete**

✔ Congratulations! Your Enrollment is Complete.

You may access your account via the plan's website at at any time using your Username and Password. If you elected to receive email confirmations, you will receive confirmation of your enrollment at the email address specified.

Reminders:

Because you did not provide investment directions for your contributions, they will be defaulted to the Default Fund until you provide other investment instructions. Once amounts are defaulted, it is your responsibility to realign them in accordance to your investment elections. For more information, please contact your plan administrator.

You have elected not to designate your beneficiaries at this time. Please enter your designations at your earliest convenience.

IF YOU DO NOT DESIGNATE ANY BENEFICIARIES, YOUR ACCOUNT WILL BE DISTRIBUTED IN ACCORDANCE TO PLAN PROVISIONS IN EVENT OF YOUR DEATH.

CONTINUE

Steps to Designate your Beneficiaries :

To designate your beneficiaries via a paper form, click [HERE](#) to access the form.

Please print the form and return a copy to your company's Human Resource department. Please also submit to Retirement Plan Consultants per the instructions on the bottom of the form.

This designation can have important tax and legal effects. You may wish to consult your advisor or lawyer when completing the beneficiary form.

The confirmation page will display.

This screen offers another opportunity to designate your beneficiaries. Click the **HERE** link to access the paper form.

If you want to access all the Participant Web Features click the **Continue** button.