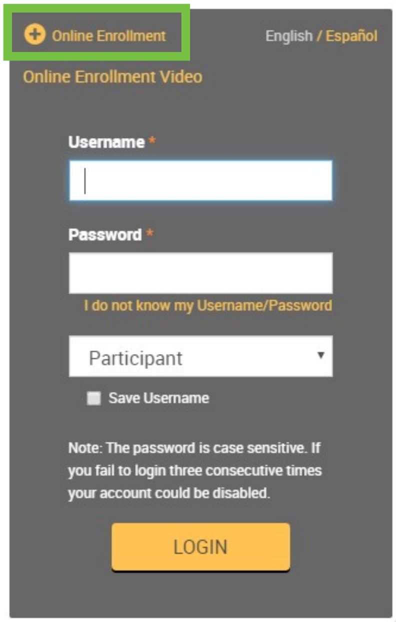
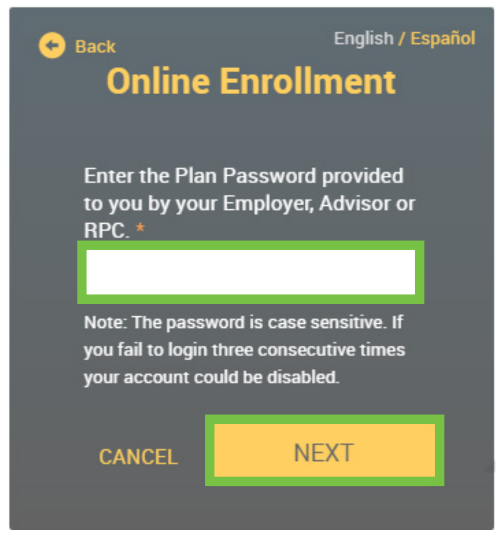
Online Enrollment

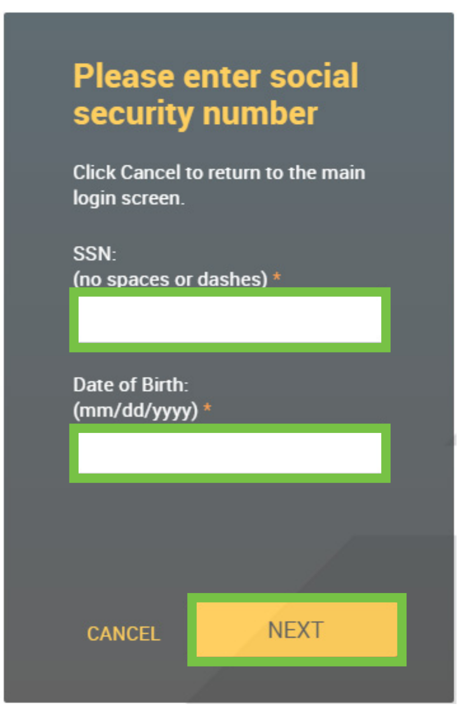
Visit https://www.yourplanaccess.net/retirementplanconsultants/



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.

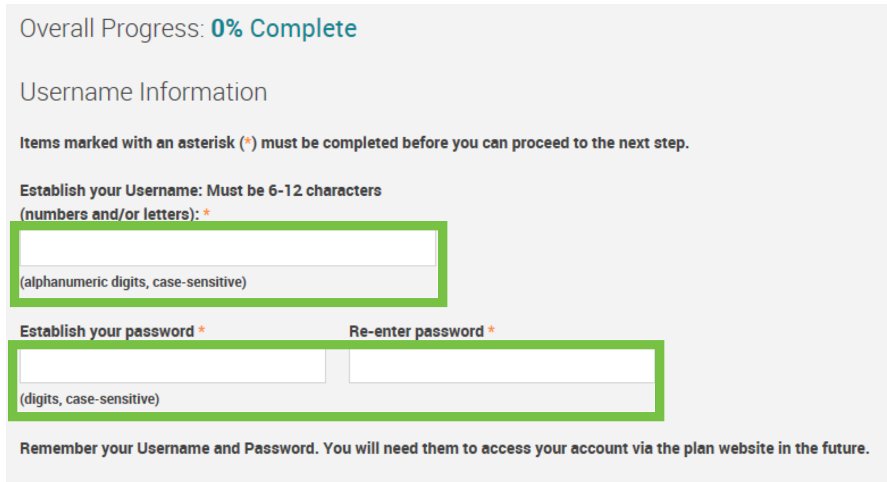


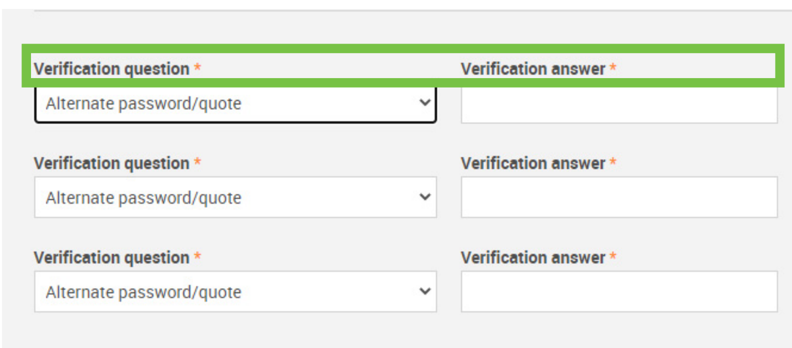
Type your **Social Security Number** (no spaces, no dashes) and your **Date of Birth** (mm/dd/yyyy) and click the **Next** button.

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.





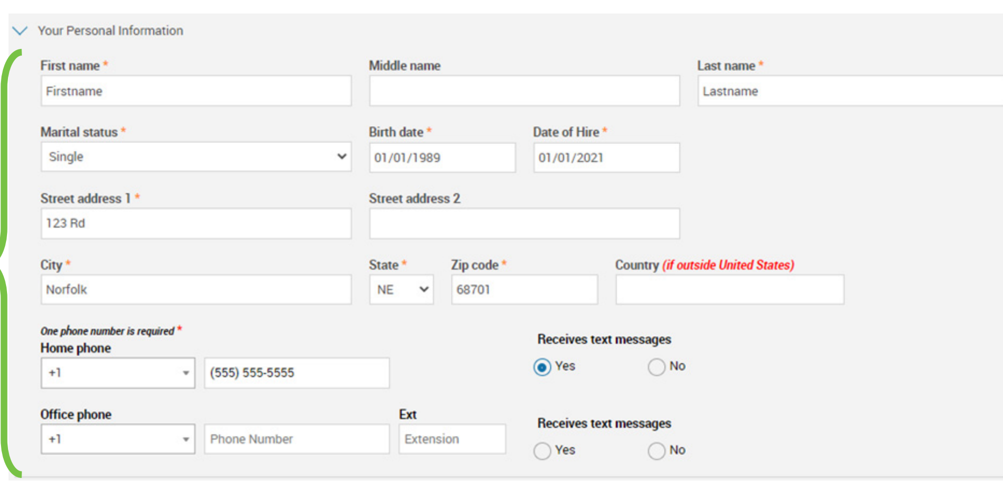
Select the dropdown to choose each **Verification question** and then enter your **Verification answer**.

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

Complete your **Personal Information** details.

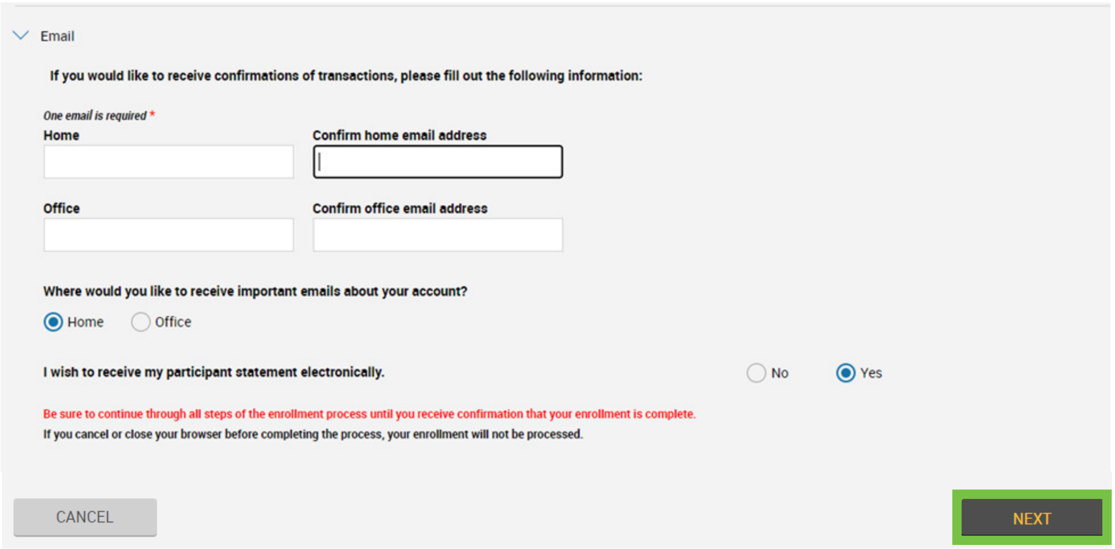
Please keep in mind that all items marked with an asterisk (*) must be completed.

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



Online Enrollment

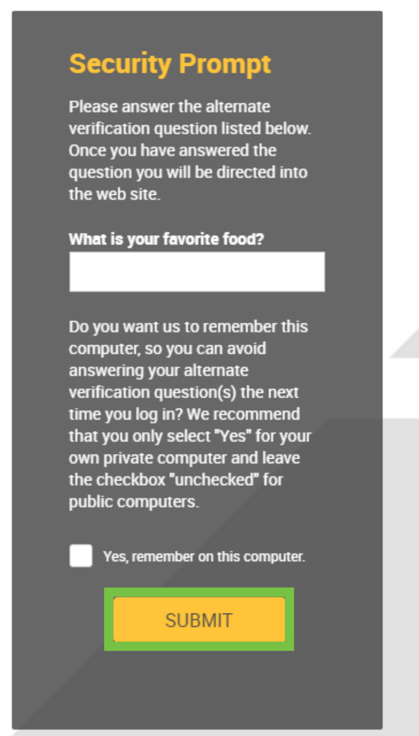
Complete the **Email** details on the lower part of the screen. Please specify whether you prefer to receive important emails about your account to either your **Home** or **Office** email.



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.



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.

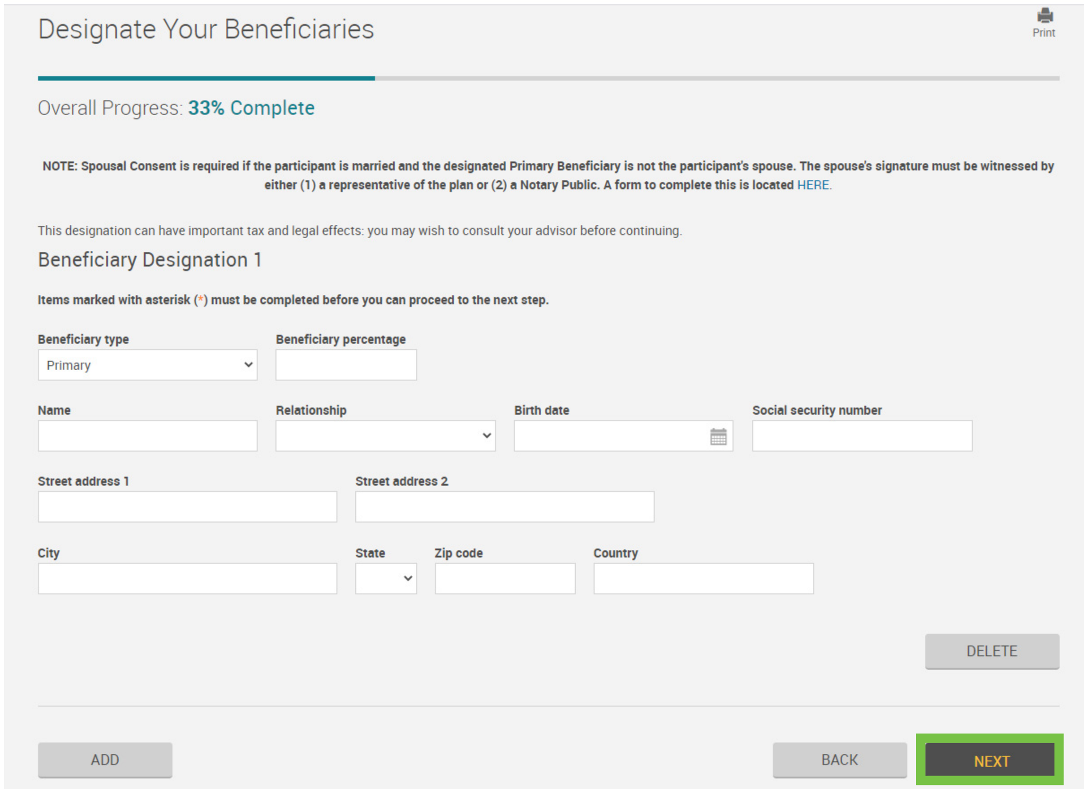
Answer the security prompt and then click the **Submit** button.

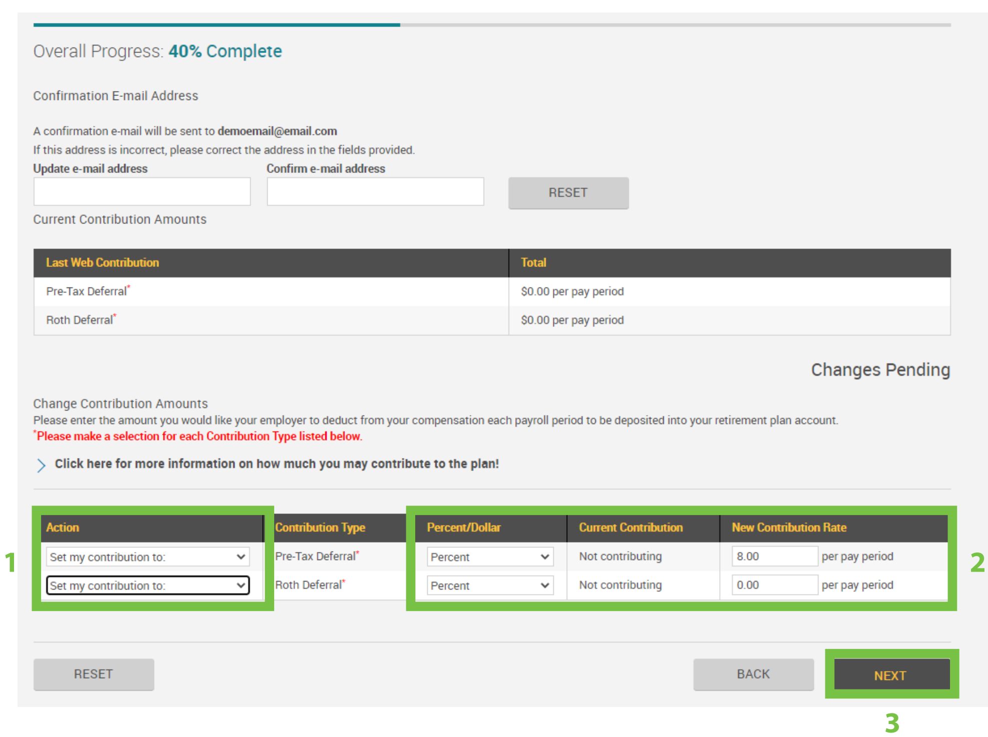
Online Enrollment

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.





1) On the next screen choose the **Action** dropdown menu next to <u>each</u> **Contribution Type** and select **Set my contributions to:** off the dropdown menu on <u>each</u> line.

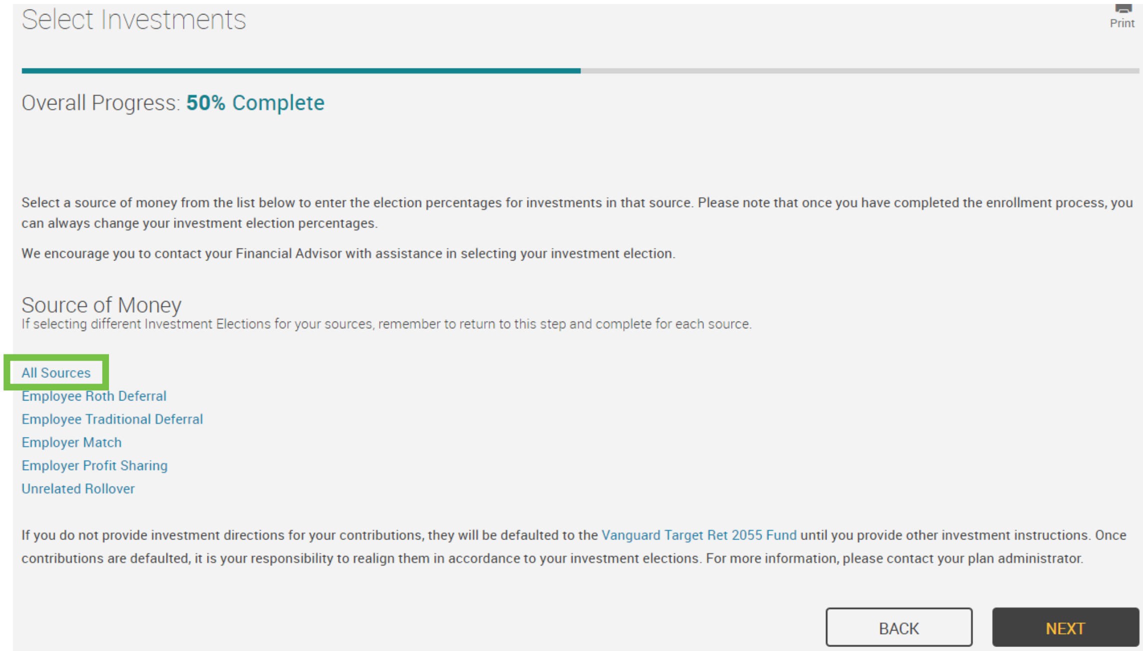
2) Then update the **New Contribution Rate** to the desired amount for <u>each</u> contribution type. The amount reflects how much will be deducted for that type each pay period.

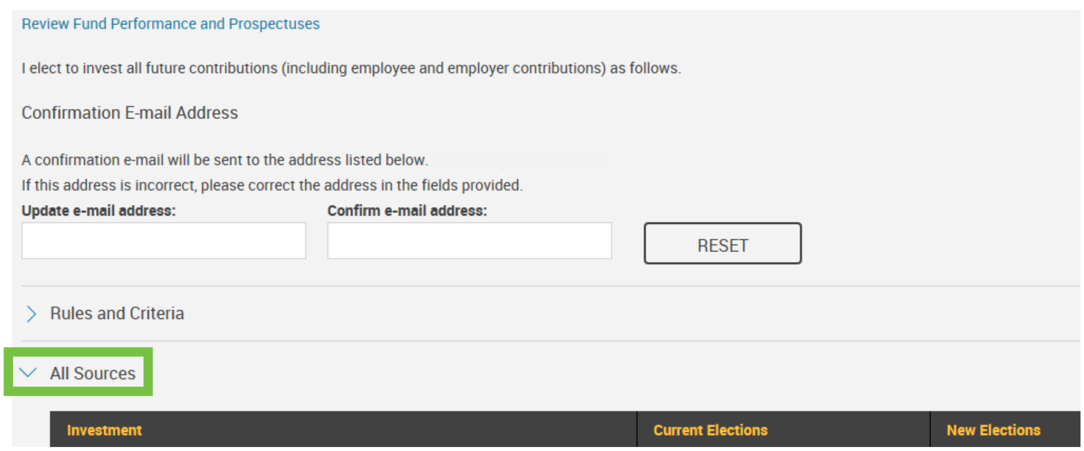
3) Click the **Next** button when all is correct.

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.





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.

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

Edit

Username:	Testtest	Marital status:	Single
First name:	Online		
Last name:	Demo		
Middle name:	Enrollment		
Street address 1:	123 Main	Home phone:	(555) 555 - 5555
Street address 2:		Office phone:	() - Ext
City:	Demo		
State:	NE	Home email address:	demoemail@email.com
Zip code:	12356	Office email address:	
Country:			
Date of birth:	11/27/1998	Send email confirmation to:	Home
Date of hire:	01/01/2020		

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, clic HERE o 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.