



Transfer Money within Your Account

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

Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.

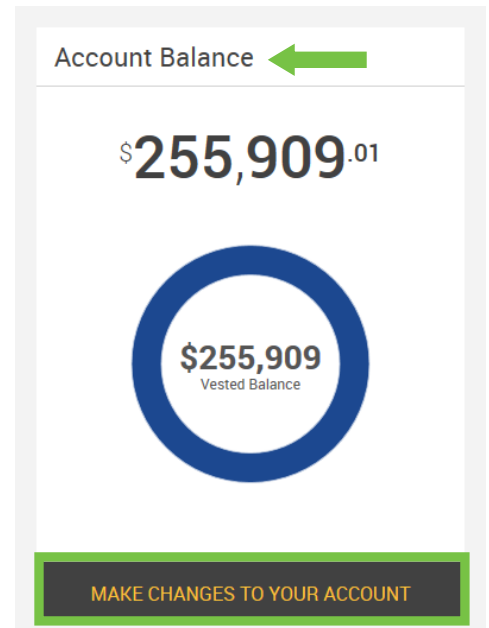
Select Role: Participant

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).

On the Participant Dashboard, your **Account Balance** will display.

Click the **Make Changes to Your Account** button.



Click the **Get Started** link under the **Move Money** option.

Choose if you would like to move money for all of your sources, or simply one source (example: Employee Roth Contributions).

After you click the appropriate selection, the page will expand with more options.



Transfer Money within Your Account

Percentage to Percentage
Dollar to Dollar
Dollar to Percentage

Select the **Transfer Type** that applies to your intended transfer.

The bottom of the screen will update according to your choices.

From	To
0 %	0 %

Complete the **From** and **To** columns for the money move.

Click the **Next** button.

Investment	Fund ID	Current Balance	From	To	Proposed Balance
Transferable Funds					
> Fund 100 Value Tilt		100.00% \$132.09	100 %	0 %	\$0.00
> Fund 20 Value Tilt		0.00% \$0.00	0 %	0 %	\$0.00
> Fund 40 Value Tilt		0.00% \$0.00	0 %	0 %	\$0.00
> Fund 60 Value Tilt		0.00% \$0.00	0 %	50 %	\$66.05
> Fund 80 Value Tilt		0.00% \$0.00	0 %	0 %	\$0.00
> Income Fund Value Tilt		0.00% \$0.00	0 %	0 %	\$0.00
Diversified Emerging Markets					
DFA Emerging Markets details	DPEMX	0.00% \$0.00	0 %	50 %	\$66.05
DFA Emerging Markets Core Portfolio details	DFCEX	0.00% \$0.00	0 %	0 %	\$0.00
DFA Emerging Markets Value details	DPEVX	0.00% \$0.00	0 %	0 %	\$0.00
Foreign Large Growth					
Vanguard International Growth Adm details	VWILX	0.00% \$0.00	0 %	0 %	\$0.00
Foreign Large Value					
DFA International Value details	DFIVX	0.00% \$0.00	0 %	0 %	\$0.00
Foreign Small/Mid Value					
DFA Intl Small Cap Value details	DFSVX	0.00% \$0.00	0 %	0 %	\$0.00
DFA Intl Small Company I details	DFISX	0.00% \$0.00	0 %	0 %	\$0.00
Global Real Estate					
DFA Global Real Estate details	DFGEX	0.00% \$0.00	0 %	0 %	\$0.00
Inflation Protected Bond					
Mid Blend					
Vanguard Mid Cap Index Adm details	VIMAX	0.00% \$0.00	0 %	0 %	\$0.00
Short-Term Bond					
Vanguard Short-Term Int-Grade Adm	VFSUX	0.00% \$0.00	0 %	0 %	\$0.00
Small Growth/Blend					
DFA US Small Cap details	DFSTX	0.00% \$0.00	0 %	0 %	\$0.00
Small Value					
DFA US Targeted Value details	DFTVX	0.00% \$0.00	0 %	0 %	\$0.00
Target Date					
Vanguard Target Ret 2015 Fund details	VTXXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2020 Fund details	VTWXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2025 Fund details	VTYXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2030 Fund details	VTBXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2035 Fund details	VTTXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2040 Fund details	VTDXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2045 Fund details	VTNXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2050 Fund details	VTBXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2055 Fund details	VTFXX	0.00% \$0.00	0 %	0 %	\$0.00
TRANSFERABLE FUNDS TOTAL		100.00% \$132.09	100.00%		\$132.09
NON-TRANSFERABLE FUNDS TOTAL		0.00% \$0.00			\$0.00
ACCOUNT TOTAL		100.00% \$132.09			\$132.09

CANCEL NEXT

Read Prospectus

Have you read the prospectus for each fund?

Funds			<input checked="" type="checkbox"/> Mark all as Read
Fund 100 Value Tilt			
DFA Emerging Markets	view prospectus	<input checked="" type="checkbox"/> Mark as Read	
DFA Emerging Markets Value	view prospectus	<input checked="" type="checkbox"/> Mark as Read	
DFA US Targeted Value	view prospectus	<input checked="" type="checkbox"/> Mark as Read	
DFA Global Real Estate	view prospectus	<input checked="" type="checkbox"/> Mark as Read	
DFA Intl Small Company I	view prospectus	<input checked="" type="checkbox"/> Mark as Read	
DFA International Value	view prospectus	<input checked="" type="checkbox"/> Mark as Read	
DFA US Large Cap Value	view prospectus	<input checked="" type="checkbox"/> Mark as Read	
DFA US Small Cap	view prospectus	<input checked="" type="checkbox"/> Mark as Read	
DFA US Large Company Inst	view prospectus	<input checked="" type="checkbox"/> Mark as Read	
DFA Intl Small Cap Value	view prospectus	<input checked="" type="checkbox"/> Mark as Read	

Read the appropriate prospectus and click the **Mark as Read** checkbox. You may click them all by selecting the **Mark all as Read** checkbox.

Click the **Next** button.

CANCEL

BACK

NEXT



Transfer Money within Your Account

Transfer Funds -

Overall Progress: 75% Complete

Review

Investment	Fund ID	Current Balance	From	To	Shares Subject to Redemption Fees	Shares Free From Redemption Fees	Projected Balance	
Transferable Funds								
> Fund 100 Value Tilt		100.00%	\$132.09	100%	0%	N/A	N/A	\$0.00
> Fund 20 Value Tilt		0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
> Fund 40 Value Tilt		0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
> Fund 60 Value Tilt		0.00%	\$0.00	0%	50%	N/A	N/A	\$66.05
> Fund 80 Value Tilt		0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
> Income Fund Value Tilt		0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Diversified Emerging Markets								
DFA Emerging Markets details	DFEMX	0.00%	\$0.00	0%	50%	0	0.124	\$66.05
DFA Emerging Markets Core Portfolio details	DFCEX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
DFA Emerging Markets Value details	DFEVX	0.00%	\$0.00	0%	0%	0	0.122	\$0.00
Foreign Large Growth								
Vanguard International Growth Adm details	VWILX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Large Value								
DFA US Large Cap Value details	DFLVX	0.00%	\$0.00	0%	0%	0	0.795	\$0.00
Mid Blend								
Vanguard Mid Cap Index Adm details	VIMAX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Short-Term Bond								
Vanguard Short-Term Inv-Grade Adm	VFSUX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Small Growth/Blend								
DFA US Small Cap details	DFSTX	0.00%	\$0.00	0%	0%	0	0.423	\$0.00
Small Value								
DFA US Targeted Value details	DFVYX	0.00%	\$0.00	0%	0%	0	1.594	\$0.00
Target Date								
Vanguard Target Ret 2015 Fund details	VTXVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2020 Fund details	VTWNX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2025 Fund details	VTTVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2030 Fund details	VTHRX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2035 Fund details	VTTXK	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2040 Fund details	VFORX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2045 Fund details	VTIVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2050 Fund details	VFIFX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2055 Fund details	VFFVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
TRANSFERABLE FUNDS TOTAL		100.00%	\$132.09		100.00%			\$132.09
NON-TRANSFERABLE FUNDS TOTAL		0.00%	\$0.00					\$0.00
ACCOUNT TOTAL		100.00%	\$132.09					\$132.09

A confirmation email will be sent to: admin@retirementplanconsultants.net

CANCEL

BACK

SUBMIT

Review your changes.

Click the **Submit** button at the bottom of the page.

Transfer Funds -

Overall Progress: 100% Complete

Confirmation

Confirmation Number: 19212

Investment	Fund ID	Current Balance	From	To	Shares Subject to Redemption Fees	Shares Free From Redemption Fees	Projected Balance	
Transferable Funds								
> Fund 100 Value Tilt		100.00%	\$132.09	100%	0%	N/A	N/A	\$0.00
> Fund 20 Value Tilt		0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
> Fund 40 Value Tilt		0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
> Fund 60 Value Tilt		0.00%	\$0.00	0%	50%	N/A	N/A	\$66.05
> Fund 80 Value Tilt		0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
> Income Fund Value Tilt		0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Diversified Emerging Markets								
DFA Emerging Markets details	DFEMX	0.00%	\$0.00	0%	50%	0	0.124	\$66.05
DFA Emerging Markets Core Portfolio details	DFCEX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
DFA Emerging Markets Value details	DFEVX	0.00%	\$0.00	0%	0%	0	0.122	\$0.00
DFA US Large Company Inst details	DFUSX	0.00%	\$0.00	0%	0%	0	1.274	\$0.00
Large Value								
DFA US Large Cap Value details	DFLVX	0.00%	\$0.00	0%	0%	0	0.795	\$0.00
Mid Blend								
Vanguard Mid Cap Index Adm details	VIMAX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Short-Term Bond								
Vanguard Short-Term Inv-Grade Adm	VFSUX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Small Growth/Blend								
DFA US Small Cap details	DFSTX	0.00%	\$0.00	0%	0%	0	0.423	\$0.00
Small Value								
DFA US Targeted Value details	DFVYX	0.00%	\$0.00	0%	0%	0	1.594	\$0.00
Target Date								
Vanguard Target Ret 2015 Fund details	VTXVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2020 Fund details	VTWNX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2025 Fund details	VTTVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2030 Fund details	VTHRX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2035 Fund details	VTTXK	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2040 Fund details	VFORX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2045 Fund details	VTIVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2050 Fund details	VFIFX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2055 Fund details	VFFVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
TRANSFERABLE FUNDS TOTAL		100.00%	\$132.09		100.00%			\$132.09
NON-TRANSFERABLE FUNDS TOTAL		0.00%	\$0.00					\$0.00
ACCOUNT TOTAL		100.00%	\$132.09					\$132.09

A confirmation email will be sent to: admin@retirementplanconsultants.net

DONE

You will be provided a **Confirmation Number** for your records.

Click the **Done** button at the bottom of the page.