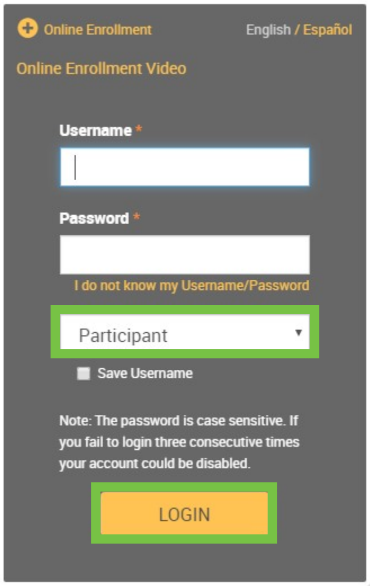
Transfer Money within Your Account

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

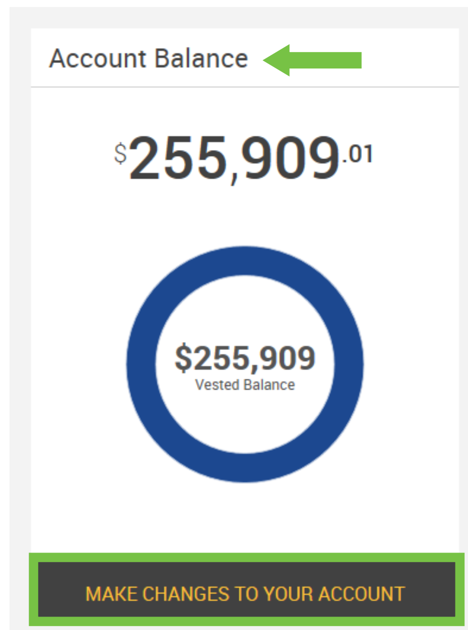


Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.

Select Role: Participant

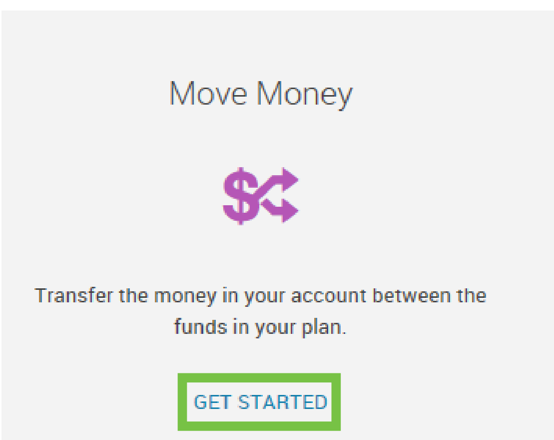
Click the **Login** button

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).

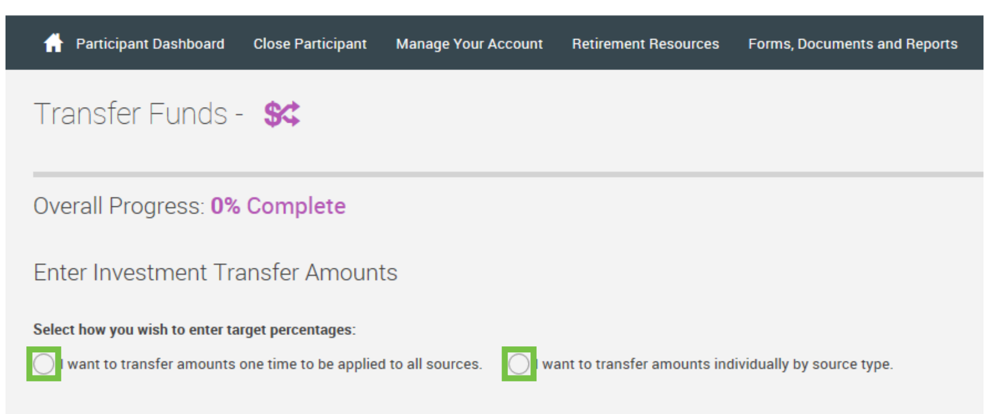


On the Participant Dashboard, your **Account Balance** will display.

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



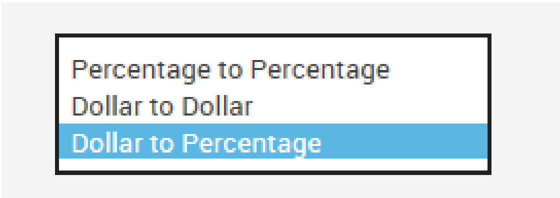
Click the **Get Started** link under the **Move Money** option.



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

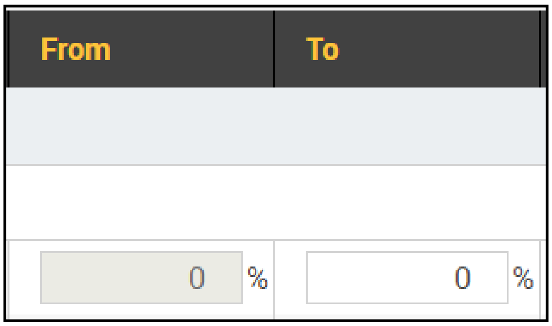
After you click the appropriate selection, the page will expand with more options.

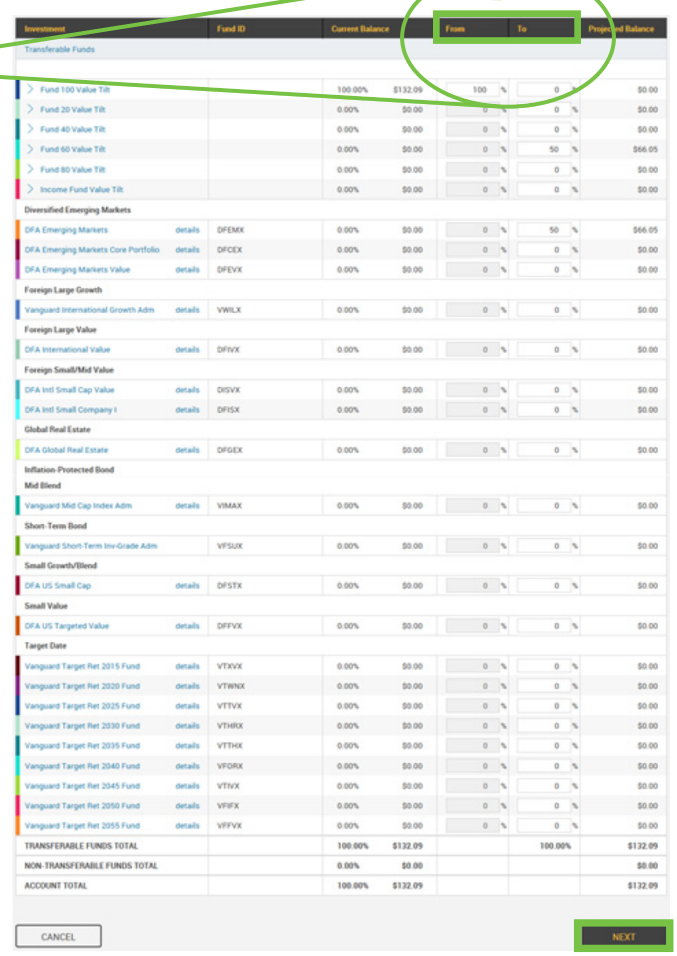
Transfer Money within Your Account



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

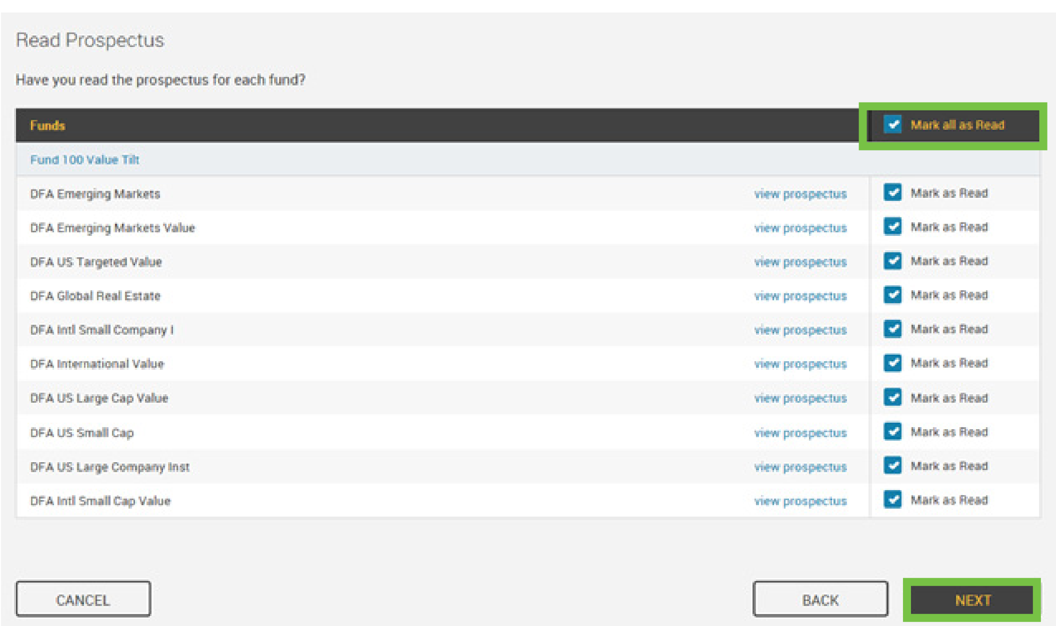
The bottom of the screen will update according to your choices.





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

Click the **Next** button.



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.

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 Redepmtion 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	DFFVX	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	VTTHX	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 Redepmtion 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	DFFVX	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	VTTHX	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.