Update Rebalance Option

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

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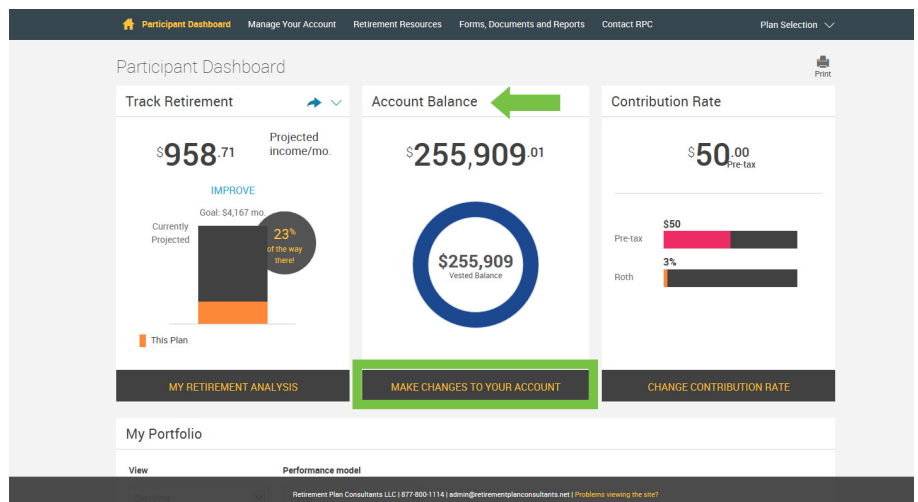
Select Role: Participant

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.

If you already have a rebalance option set up this section will state the date of the next rebalance.

Click the **Get Started** link under the **Rebalance** option to make changes.

If you already have a rebalance option setup this section will state the frequency.

Select the **Make Changes** link under the **Recurring Rebalance** section.

To **Turn ON** the recurring rebalance, complete the following sections:

1. How often you would like to rebalance:
   - Once a year
   - Twice a year
   - Every three months
   - Every month
2. Set date of first rebalance.
3. Enter threshold percent for rebalance.
4. Click the **Next** button.

RPC rebalances on the 26th day of the month.

To **Turn OFF** the recurring rebalance:
- Toggle the button to **OFF**.
- Click the **Next** button.

Review your selections and the click the **Submit** button.

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

Click the **Done** button.