



Access Plan Forms and Documents for Enrolling Employees

Visit <https://retirementplanconsultants.info> and click **Account Access**.

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

Select role from dropdown menu: **Sponsor**

Click the **Login** button

A One-Time PIN (OTP) is required to login using multi-factor authentication (MFA). If you need additional guidance with the OTP process, click the **Guide to Logging in with MFA** link (located at the top of this gray login box).

When enrolling employees, plan forms and documents can be accessed online and downloaded for open enrollments, etc. To run your plan specific documents, click the **Forms, Documents and Reports** tab and select **Forms and Documents** off the dropdown menu.

Choose **Generate Forms** off the dropdown list if not already shown and click the **Online Enrollment Flyer** in the Form Selection section shown and click the **Submit** button.



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Forms and Documents

Generate Forms
Generate Forms
View Documents
None

Form Selection

Beneficiary Designation Form
To be completed by Participant & sent to RPC. **Must use paper form when Spousal Consent required

Online Enrollment Flyer
Generate flyer for employee online enrollment instructions.

Rollover Exchange Request Form
To be completed by Participant to consolidate other accounts to this account.

Options

Divisions: All Divisions

Select employee: All Employees

Select export file type: Adobe Acrobat (PDF)

SUBMIT

Choose **View Documents** off the dropdown list if not already shown and click the **Submit** button.

The remaining documents will be located and can be directly downloaded from this screen by clicking on the document links, such as:

- **404(a)(5) Fee Disclosure**
- **404(a)(5) Investment Comparative Chart**
- **Summary Plan Description**

Select Forms

View Documents

Filter column: Document/Form Name

Filter value:

CLEAR RESULTS

Document/Form Name	Document/Form Group	Employer	Created	Last Viewed	From	To	Delete
01 RPC Services Agree...	Plan Documents	0-RPC Demo Company	09/07/2021	10/29/2021			<input type="checkbox"/>
01b Plan Contact Authori...	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021			<input type="checkbox"/>
01b Service Provider App...	Plan Documents	0-RPC Demo Company	12/08/2021	12/08/2021			<input type="checkbox"/>
01b Service Provider App...	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021			<input type="checkbox"/>
02 3(38) Fiduciary Agree...	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021			<input type="checkbox"/>
03 Matrix Trust Custodial...	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021			<input type="checkbox"/>
03c Matrix Trust Custodi...	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021			<input type="checkbox"/>
12a Retirement Plan Co...	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021			<input type="checkbox"/>
12b Retirement Plan Co...	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021			<input type="checkbox"/>
12c Retirement Plan Co...	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021			<input type="checkbox"/>
12d Fiduciary Acknowled...	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021			<input type="checkbox"/>

You can direct participants here: <https://retirementplanconsultants.info/plan-participant-resource-center/> for an online enrollment guide with step-by-step instructions.