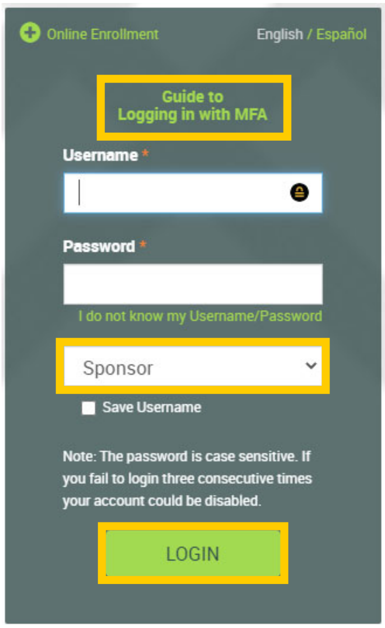
Adding an Employee via the Plan Sponsor Website

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



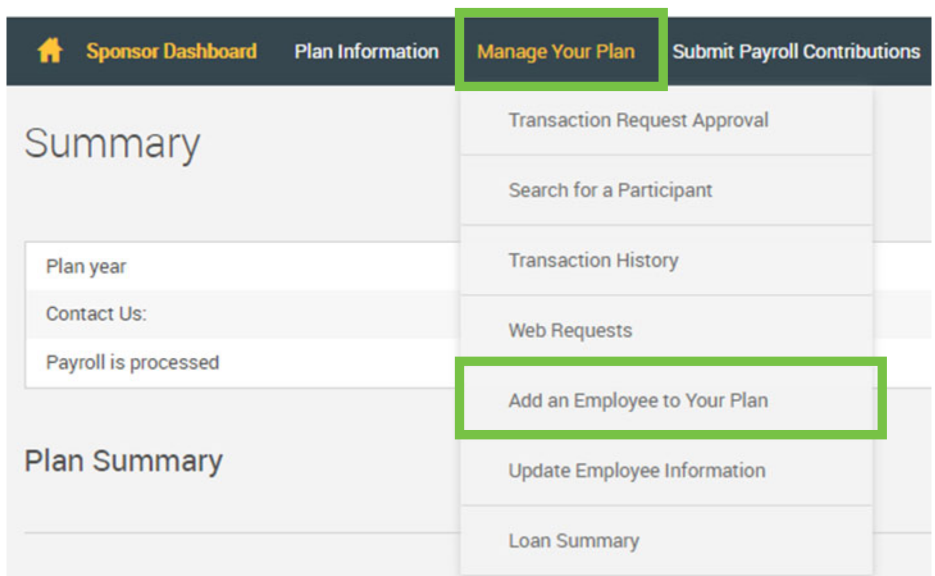
Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.

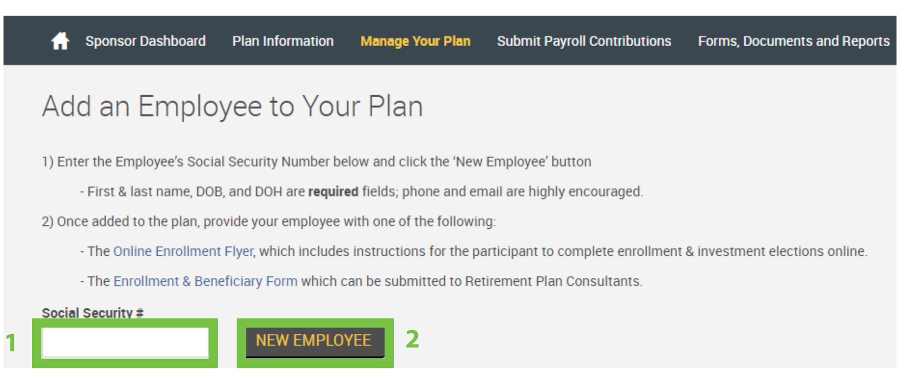
Select role from dropdown menu: <u>**Sponsor**</u>

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).

Once signed into the Plan Sponsor Web, click the **Add an Employee to Your Plan** option under the **Manage Your Plan** tab.





1) Type in the **Employee SSN**.
2) Click the **New Employee** button.

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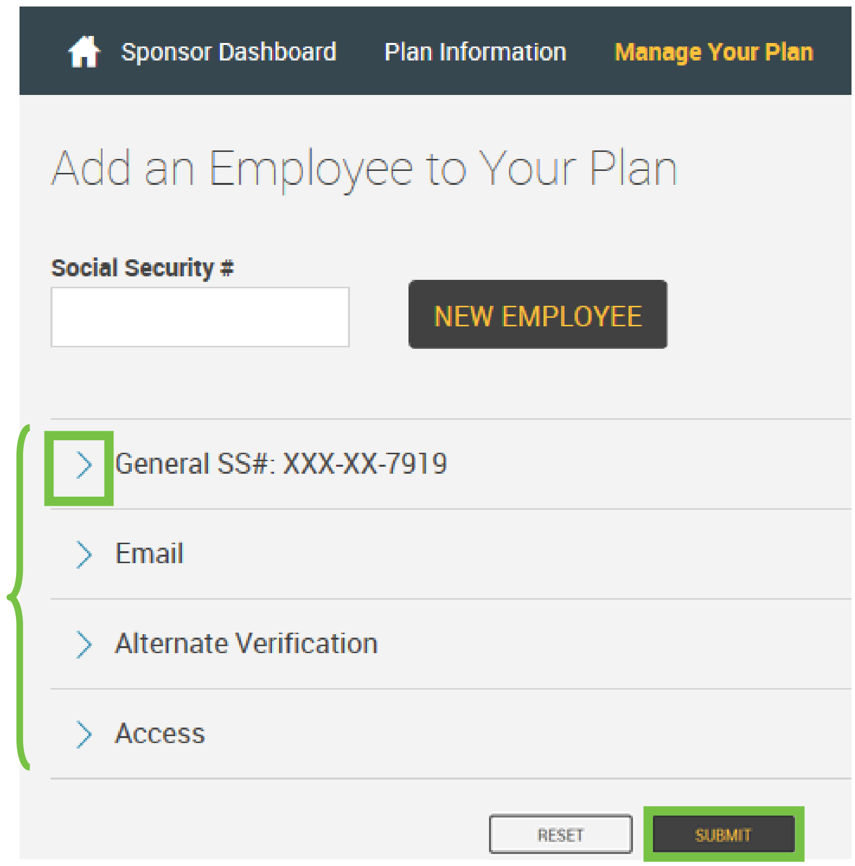
You may ***click the arrow*** *next to each section to expand and enter the participant's information:*

- **General:** Enter Name, Date of Birth, Date of Hire, Address.
- **Email:** Enter Email Address, How to Receive Participant Statements and where to send email confirmations.
- **Alternate Verification:** This is used to setup a verification question, which may be used to reset a username and password in the future.
- **Access:** You may setup the participant with login credentials to access the Participant Web.
- Click the **Submit** button when appropriate information is entered.



- The Participant is instantly added to the plan!