

This is a step-by-step guide for obtaining participant contact information via the Data Validation Center (DVC).

Visit <u>https://retirementplanconsultants.info</u> 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).

Please note: This list generates all active participants which includes terminated employees with a balance. The information in this report contains information provided by the employer or participants. We recommend that you check for accuracy.



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			Check us out on YouTu			ibe! N	Click the Reports op-	
	🔺 Sponsor Dashboard Plan Inform	ation Manage Your Plan Submit Payroll Contributions	Forms, Docume	nts and Reports	5	Quic	tion under the	Forms
	Summary	Forms and Documents				ports tab.		
	Computed balance dollar amour	its include the estimated dollar amounts for pending tr	Reports					
		Reports						Print
1)	Select the Employee Contact Information report.	generated using Effective Date.** Generate Reports Generate Reports					Plan Consultants. Many Form 550	JOS are
2)	Choose Excel as the export file type and	Select report group						
	enter the current date in the From and To date fields.	Report Selection		Optior	IS			
		Contribution Rate Changes (Historical) Employee contribution rate changes within a specified timeframe		All Divisions	ions	~		
3)	Click the Submit button.	Employee Deferral Rates (Most Recent) Contribution rate for participants with rate changes during the rep	oort period.	Select em	i ployee loyees	v		
		Catch-up Contribution Eligibility All catch-up eligible participants, year eligible, and employment status						
		Repolicion I ist		Select exp	port file type		Available plan years	
		List of participants and the beneficiaries designated		Adobe A	crobat (PDF)	~	01/01/2021 - 12/31/2021	~
	1	Employee Contact Information Participant list with contact information.		From n/a		i	To date n/a	Ħ
		Investment Holdings by Participant List of participants with balance in each Investment Product/Fund	d.				SUBM	ит З