



Transfer Money within Your Account

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

Online Enrollment English / Español

Guide to Logging in with MFA

Username *

Password *

I do not know my Username/Password

Participant

Save Username

Note: The password is case sensitive. If you fail to login three consecutive times your account could be disabled.

LOGIN

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

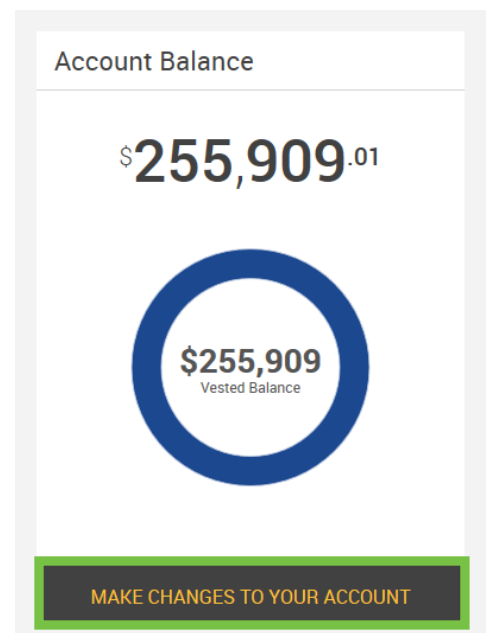
Select role from dropdown menu: **Participant**

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).

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

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



Move Money

Transfer the money in your account between the funds in your plan.

GET STARTED

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.

Participant Dashboard Close Participant Manage Your Account Retirement Resources Forms, Documents and Reports

Transfer Funds - \$$\leftrightarrow$

Overall Progress: 0% Complete

Enter Investment Transfer Amounts

Select how you wish to enter target percentages:

want to transfer amounts one time to be applied to all sources. want to transfer amounts individually by source type.



Transfer Money within Your Account

Percentage to Percentage
 Dollar to Dollar
 Dollar to Percentage

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

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

From	To
0 %	0 %

Investment	Fund ID	Current Balance	From	To	Proposed Balance
Transferable Funds					
> Fund 100 Value Tilt		100.00% \$132.09	100 %	0 %	\$0.00
> Fund 20 Value Tilt		0.00% \$0.00	0 %	0 %	\$0.00
> Fund 40 Value Tilt		0.00% \$0.00	0 %	0 %	\$0.00
> Fund 60 Value Tilt		0.00% \$0.00	0 %	50 %	\$66.05
> Fund 80 Value Tilt		0.00% \$0.00	0 %	0 %	\$0.00
> Income Fund Value Tilt		0.00% \$0.00	0 %	0 %	\$0.00
Diversified Emerging Markets					
DFA Emerging Markets	DFEMX	0.00% \$0.00	0 %	50 %	\$66.05
DFA Emerging Markets Core Portfolio	DFCEX	0.00% \$0.00	0 %	0 %	\$0.00
DFA Emerging Markets Value	DFEVX	0.00% \$0.00	0 %	0 %	\$0.00
Foreign Large Growth					
Vanguard International Growth Adm	VWILX	0.00% \$0.00	0 %	0 %	\$0.00
Foreign Large Value					
DFA International Value	DFIVX	0.00% \$0.00	0 %	0 %	\$0.00
Foreign Small/Mid Value					
DFA Intl Small Cap Value	DFSVX	0.00% \$0.00	0 %	0 %	\$0.00
DFA Intl Small Company I	DFISX	0.00% \$0.00	0 %	0 %	\$0.00
Global Real Estate					
DFA Global Real Estate	DFGEX	0.00% \$0.00	0 %	0 %	\$0.00
Inflation Protected Bond					
Mid Blend					
Vanguard Mid Cap Index Adm	VIMAX	0.00% \$0.00	0 %	0 %	\$0.00
Short-Term Bond					
Vanguard Short-Term Inv-Grade Adm	VFSUX	0.00% \$0.00	0 %	0 %	\$0.00
Small Growth/Blend					
DFA US Small Cap	DFSTX	0.00% \$0.00	0 %	0 %	\$0.00
Small Value					
DFA US Targeted Value	DFTVX	0.00% \$0.00	0 %	0 %	\$0.00
Target Date					
Vanguard Target Ret 2015 Fund	VTXXV	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2020 Fund	VTWXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2025 Fund	VTYXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2030 Fund	VTHRX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2035 Fund	VTHXK	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2040 Fund	VFORX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2045 Fund	VTIXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2050 Fund	VTFXX	0.00% \$0.00	0 %	0 %	\$0.00
Vanguard Target Ret 2055 Fund	VFFVX	0.00% \$0.00	0 %	0 %	\$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

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

Click the **Next** button.

Read Prospectus

Have you read the prospectus for each fund?

Funds		<input checked="" type="checkbox"/> Mark all as Read
Fund 100 Value Tilt		
DFA Emerging Markets	view prospectus	<input checked="" type="checkbox"/> Mark as Read
DFA Emerging Markets Value	view prospectus	<input checked="" type="checkbox"/> Mark as Read
DFA US Targeted Value	view prospectus	<input checked="" type="checkbox"/> Mark as Read
DFA Global Real Estate	view prospectus	<input checked="" type="checkbox"/> Mark as Read
DFA Intl Small Company I	view prospectus	<input checked="" type="checkbox"/> Mark as Read
DFA International Value	view prospectus	<input checked="" type="checkbox"/> Mark as Read
DFA US Large Cap Value	view prospectus	<input checked="" type="checkbox"/> Mark as Read
DFA US Small Cap	view prospectus	<input checked="" type="checkbox"/> Mark as Read
DFA US Large Company Inst	view prospectus	<input checked="" type="checkbox"/> Mark as Read
DFA Intl Small Cap Value	view prospectus	<input checked="" type="checkbox"/> Mark as Read

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.

CANCEL

BACK

NEXT



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 Redemption 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	DFEMX	0.00%	\$0.00	0%	50%	0	0.124	\$66.05
DFA Emerging Markets Core Portfolio	DFCEX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
DFA Emerging Markets Value	DFEVX	0.00%	\$0.00	0%	0%	0	0.122	\$0.00
Foreign Large Growth								
Vanguard International Growth Adm	VWILX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Large Value								
DFA US Large Cap Value	DFLVX	0.00%	\$0.00	0%	0%	0	0.795	\$0.00
Mid Blend								
Vanguard Mid Cap Index Adm	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	DFSTX	0.00%	\$0.00	0%	0%	0	0.423	\$0.00
Small Value								
DFA US Targeted Value	DFVYX	0.00%	\$0.00	0%	0%	0	1.594	\$0.00
Target Date								
Vanguard Target Ret 2015 Fund	VTXVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2020 Fund	VTWNX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2025 Fund	VTTVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2030 Fund	VTHRX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2035 Fund	VTHHX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2040 Fund	VFORX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2045 Fund	VTIVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2050 Fund	VFIXX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2055 Fund	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 Redemption 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	DFEMX	0.00%	\$0.00	0%	50%	0	0.124	\$66.05
DFA Emerging Markets Core Portfolio	DFCEX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
DFA Emerging Markets Value	DFEVX	0.00%	\$0.00	0%	0%	0	0.122	\$0.00
DFA US Large Company Inst	DFUSX	0.00%	\$0.00	0%	0%	0	1.274	\$0.00
Large Value								
DFA US Large Cap Value	DFLVX	0.00%	\$0.00	0%	0%	0	0.795	\$0.00
Mid Blend								
Vanguard Mid Cap Index Adm	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	DFSTX	0.00%	\$0.00	0%	0%	0	0.423	\$0.00
Small Value								
DFA US Targeted Value	DFVYX	0.00%	\$0.00	0%	0%	0	1.594	\$0.00
Target Date								
Vanguard Target Ret 2015 Fund	VTXVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2020 Fund	VTWNX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2025 Fund	VTTVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2030 Fund	VTHRX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2035 Fund	VTHHX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2040 Fund	VFORX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2045 Fund	VTIVX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2050 Fund	VFIXX	0.00%	\$0.00	0%	0%	N/A	N/A	\$0.00
Vanguard Target Ret 2055 Fund	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.