



Update Investment Direction

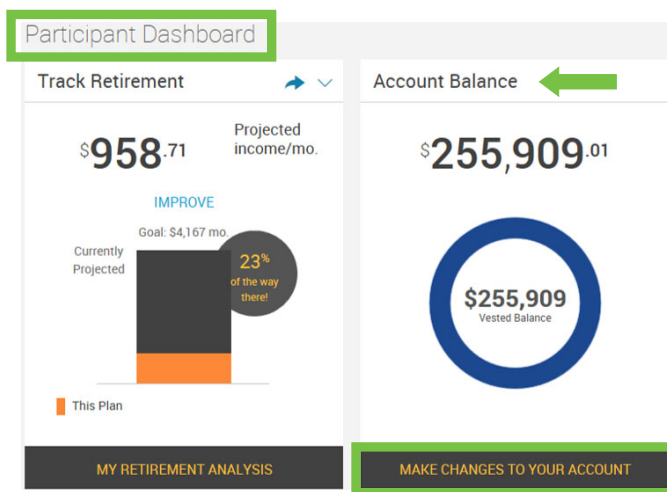
Visit <https://retirementplanconsultants.info> and click **Account Access**.

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

Select role from dropdown menu: **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 to update your investment direction.

Click the **Get Started** link under the **Change Elections** option.

Choose if you would like to update the investment election 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.



Update Investment Direction

Current Investment Elections
How new contributions are currently invested

New Investment Elections
How new contributions will be invested after you have changed your elections

Compare

Investment	Fund ID	Current Allocation %	New Election %
Available Customized Portfolios and Models			
> Fund 100 Value Tilt		0%	<input type="text" value="100"/>
> Fund 20 Value Tilt		0%	<input type="text" value="0"/>
> Fund 40 Value Tilt		0%	<input type="text" value="0"/>
> Fund 60 Value Tilt		100%	<input type="text" value="0"/>
> Fund 80 Value Tilt		0%	<input type="text" value="0"/>
Vanguard Mid Cap Index Adm			
	details VIMAX	0%	<input type="text" value="0"/>
Short-Term Bond			
	VFSUX	0%	<input type="text" value="0"/>
Small Growth/Blend			
	details DFSTX	0%	<input type="text" value="0"/>
Small Value			
	details DFFVX	0%	<input type="text" value="0"/>
Target Date			
	details VTXVX	0%	<input type="text" value="0"/>
	details VTWNX	0%	<input type="text" value="0"/>
	details VTTVX	0%	<input type="text" value="0"/>
	details VTHRX	0%	<input type="text" value="0"/>
	details VTTHX	0%	<input type="text" value="0"/>
	details VFORX	0%	<input type="text" value="0"/>
	details VTIVX	0%	<input type="text" value="0"/>
	details VFIFX	0%	<input type="text" value="0"/>
	details VFFVX	0%	<input type="text" value="0"/>
TOTAL		100%	100%

CANCEL NEXT

Current Allocation %	New Election %
0%	<input type="text" value="100"/>

Type your new desired investment election within the **New Election** field.

Click the **Next** button at the bottom of the page.

Choose if you would like to rebalance the transferable balances.

Click the **Next** button at the bottom of the page.

Change Elections

Overall Progress: **20% Complete**

Transferable Balances

Would you like to rebalance your transferable balances in your plan to conform with the percentages you entered for your investment elections?

No Yes

CANCEL BACK NEXT



Update Investment Direction

Change Elections

Overall Progress: **60% Complete**

Read Prospectus

Have you read the prospectus for each fund?

Funds		
Fund 100 Value Tilt	<input checked="" type="checkbox"/> Mark all as Read	
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

CANCEL BACK NEXT

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.

Change Elections

Overall Progress: **80% Complete**

Review

Election Percentages

Investment	Fund ID	Current Allocation %	New Election %
Available Customized Portfolios and Models			
> Fund 100 Value Tilt		0%	100%
> Fund 20 Value Tilt		0%	0%
> Fund 40 Value Tilt		0%	0%
> Fund 60 Value Tilt		100%	0%
> Fund 80 Value Tilt		0%	0%
> Income Fund Value Tilt		0%	0%
Diversified Emerging Markets			
DFA Emerging Markets	details DFEMX	0%	0%
DFA Emerging Markets Core Portfolio	details DFCEX	0%	0%
Vanguard Short-Term Inv-Grade Adm			
Vanguard Short-Term Inv-Grade Adm	VFSUX	0%	0%
Small Growth/Blend			
DFA US Small Cap	details DFSTX	0%	0%
Small Value			
DFA US Targeted Value	details DFFVX	0%	0%
Target Date			
Vanguard Target Ret 2015 Fund	details VTXXV	0%	0%
Vanguard Target Ret 2020 Fund	details VTWNV	0%	0%
Vanguard Target Ret 2025 Fund	details VTTVX	0%	0%
Vanguard Target Ret 2030 Fund	details VTHRX	0%	0%
Vanguard Target Ret 2035 Fund	details VTTHX	0%	0%
Vanguard Target Ret 2040 Fund	details VFORX	0%	0%
Vanguard Target Ret 2045 Fund	details VTIXX	0%	0%
Vanguard Target Ret 2050 Fund	details VFIFX	0%	0%
Vanguard Target Ret 2055 Fund	details VFFVX	0%	0%
TOTAL		100%	100%

A confirmation email will be sent to: [abc@myemail.com](#) [edit email address](#)

CANCEL BACK SUBMIT

Review your changes. Click the **Submit** button at the bottom of the page.

Change Elections

Overall Progress: **100% Complete**

Confirmation

Confirmation Number: 19210

Election Percentages

Investment	Fund ID	Current Allocation %	New Election %
Available Customized Portfolios and Models			
> Fund 100 Value Tilt		0%	100%
> Fund 20 Value Tilt		0%	0%
> Fund 40 Value Tilt		0%	0%
> Fund 60 Value Tilt		100%	0%
> Fund 80 Value Tilt		0%	0%
> Income Fund Value Tilt		0%	0%
Mid Blend			
Vanguard Mid Cap Index Adm	details VIMAX	0%	0%
Short-Term Bond			
Vanguard Short-Term Inv-Grade Adm	VFSUX	0%	0%
Small Growth/Blend			
DFA US Small Cap	details DFSTX	0%	0%
Small Value			
DFA US Targeted Value	details DFFVX	0%	0%
Target Date			
Vanguard Target Ret 2015 Fund	details VTXXV	0%	0%
Vanguard Target Ret 2020 Fund	details VTWNV	0%	0%
Vanguard Target Ret 2025 Fund	details VTTVX	0%	0%
Vanguard Target Ret 2030 Fund	details VTHRX	0%	0%
Vanguard Target Ret 2035 Fund	details VTTHX	0%	0%
Vanguard Target Ret 2040 Fund	details VFORX	0%	0%
Vanguard Target Ret 2045 Fund	details VTIXX	0%	0%
Vanguard Target Ret 2050 Fund	details VFIFX	0%	0%
Vanguard Target Ret 2055 Fund	details VFFVX	0%	0%
TOTAL		100%	100%

A confirmation email will be sent to: [abc@myemail.com](#) [edit email address](#)

DONE

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

Click the **Done** button at the bottom of the page.